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DEPT. COMM. NO. 175

David I. Ige
Governor

John De Fries
President and Chief Executive Officer

December 18, 2020

Aloha,

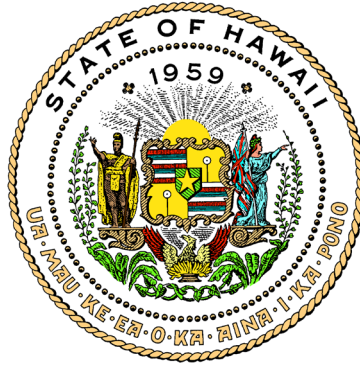
For your information and consideration, please find a copy of the 2020 Hawai'i Tourism Authority Annual Report, as required by Chapter 201B, Hawai'i Revised Statutes.

In accordance with Section 201B-16, Hawai'i Revised Statutes, the report may also be viewed electronically at: <https://www.hawaiiitourismauthority.org/who-we-are/annual-report/>.

Sincerely,

A handwritten signature in black ink, appearing to read "John De Fries".

John De Fries
President & CEO
Hawai'i Tourism Authority



HAWAII TOURISMTM

AUTHORITY

2020 Annual Report to the Hawai'i State Legislature

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MESSAGE FROM THE PRESIDENT & CEO

Aloha kākou,

We share this annual report for 2020 with you, our partners in the Hawai'i State Legislature.

This has been a year of change and challenge. The COVID-19 pandemic and our state's quarantine order for travelers, which started at the end of March, have had an unprecedented effect on Hawai'i's visitor industry. In just the first 10 months of 2020, total visitor arrivals dropped 73.4 percent compared to last year, and this has resulted in an economic collapse leading to furloughs, layoffs and closures for far too many businesses in Hawai'i.

This has also been a year of change for HTA's leadership. My predecessor, Chris Tatum, retired at the end of August, and I took over as president and CEO of HTA in mid-September. Hawai'i is faced with a myriad of daunting challenges, which include being able to welcome more visitors at a time when immense anxiety is felt in our communities across the state.

At the beginning of 2020, before the global pandemic started, we published our Strategic Plan 2020-2025. HTA is organized around four interacting pillars which are: natural resources, Hawaiian culture, community, and brand marketing.

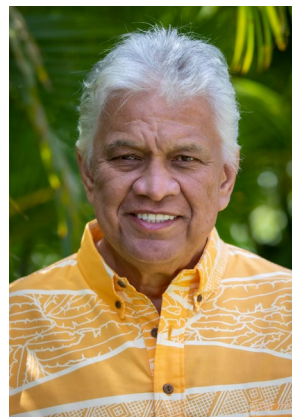
This year we had planned to fund hundreds of events and nonprofit organizations across the state that benefited our natural resources, Hawaiian culture, and community. However, the pandemic changed that, and our year has been focused on crisis communications, visitor education and assistance, and recovery efforts.

We will continue to work with the Legislature and other state agencies to support initiatives that are in alignment with our overall mission. Our team values your support, appreciates your input and welcomes your views on how the Hawai'i Tourism Authority can better serve the needs of our tourism industry and the residents of our state.

Thank you. Mālama pono,



John De Fries
President & CEO
Hawai'i Tourism Authority



HTA'S VISION

Our Mission

- The Hawai'i Tourism Authority's mission is to strategically manage Hawai'i tourism in a sustainable manner consistent with economic goals, cultural values, preservation of natural resources, community desires and visitor industry needs.

Our Kuleana

- As a state-funded entity, the Hawai'i Tourism Authority's kuleana is to manage tourism for the State of Hawai'i in a way that helps improve the quality of life for residents, families and communities on all islands.
- The welfare of the Hawaiian Islands, both for today – and especially for the future – is what matters most in how we fulfill HTA's mission. Our overriding objective is for HTA to make a positive, lasting impact for Hawai'i through the tourism industry.
- We are responsible, first and foremost, for protecting the iconic brand of the Hawaiian Islands. This includes perpetuating Hawaiian culture, preserving Hawai'i's natural environment, and strengthening communities by supporting programs kama'āina treasure and visitors enjoy.
- We are also responsible for guiding the direction of Hawai'i tourism to support the economic vitality of the state, and each individual island. Tourism's revenue provides jobs, supports businesses and creates opportunities for kama'āina of all generations to grow and prosper.

Fulfilling Our Mandate

- Hawai'i's tourism industry generates the funding for HTA, which is allocated by the state legislature. HTA works closely with our partners in the legislature, as well as the tourism industry, to ensure our mission is being fulfilled with the state's best interests in mind.
- Enhancing resident sentiment is dependent on kama'āina appreciating the connection between tourism and how we live in Hawai'i. Ensuring that the community understands how tourism is funded and ultimately supports programs and services that affect their quality of life is critical to our mission.
- Kama'āina are vital to the quality of the visitor experience.
- We are completely transparent with how our budget is being utilized and will provide clear information to lawmakers, industry partners, media and the general public as to our funding allocation. Allocations are made only after a rigorous vetting process of each line item.

- Our marketing efforts are focused on working with contractors in key markets worldwide who share our commitment to attract high value visitors while staying true to Hawai'i's brand. All contractors are retained after going through a detailed RFP process to ensure the marketing of Hawai'i's brand is being handled by effective, experienced experts whose strategies, tactics and mindset are aligned with HTA's kuleana.

Our Importance to Hawai'i

- Hawai'i represents many qualities to many people – both kama'āina and visitors. Within the global travel community, Hawai'i's brand is strong, appealing and widely recognized, and is the biggest reason why the Hawaiian Islands are in such great demand by travelers worldwide.
- The strength of Hawai'i's brand is weighed differently by different audiences, often depending on a personal experience with the destination or particular point of interest, such as culture, the environment, diversity or social relationships.
- To kama'āina, the significance of Hawai'i's brand is summed up in four words: "This is our home."
- That's why HTA's effort to holistically manage tourism (our kuleana) is so important to Hawai'i's future.

HTA BOARD OF DIRECTORS

HTA's Board of Directors is a policy-making entity comprised of 12 members, appointed by the Governor of Hawai'i, who serve as volunteers and meet monthly to guide the agency's work on behalf of the State of Hawai'i. Board approval is required for key HTA functions and initiatives, including its annual budget and annual marketing plan, which includes funding support of community programs.

Mr. L. Richard Fried Jr., Chair

Founding Member

Cronin Fried Sekiya Kekina & Fairbanks

Attorneys at Law

Mr. Micah Alameda

Assistant General Manager & Marketing

Manager

Nā Leo o Hawai'i

Mr. David Z. Arakawa

Executive Director

Land Use Research Foundation of Hawai'i

Mr. Fred Atkins

Managing Partner

Kaua'i Kilohana Partners

Mr. Daniel Chun

Director of Sales, Community & Public

Relations – Hawai'i

Alaska Airlines

Mr. George Kam

Ambassador of Aloha

Ms. Kyoko Kimura

Director - Owner Relations

Aqua-Aston Hospitality

Ms. Ku'uipo Kumukahi

Hawaiian Culture Manager

Hyatt Regency Waikiki

Ms. Sherry Menor-McNamara

President & CEO

Chamber of Commerce Hawai'i

Mr. Benjamin Rafter

CEO

OLS Hotels & Resorts

Mr. Kelly Sanders

Vice President of Operations

Highgate

Ms. Kimi Yuen

Principal/Planner

PBR Hawai'i & Associates, Inc.

During 2020, HTA's monthly Board of Directors meetings included socially distanced in-person meetings and virtual meetings via Zoom.



OVERVIEW OF HTA

The Hawai'i Tourism Authority was established in 1998 through a legislative act to serve as the state's lead agency strategically managing tourism, Hawai'i's largest industry. The same act also established the Tourism Special Fund. A portion of the money collected from the Transient Accommodations Tax (TAT), which people pay when they stay in legal accommodations in Hawai'i, funds HTA's community-focused programs, brand marketing and destination management initiatives. In addition to its legal responsibilities, HTA strives to:

- Ensure that Hawai'i delivers on its brand promise
- Support efforts to address broad tourism issues
- Lead the visitor industry in supporting a strong economy
- Place the interests and benefits of residents first
- Serve as a source for information on tourism market research
- Educate visitors about traveling responsibly

MEASURES OF SUCCESS

HTA measures its success by the following Key Performance Indicators (KPIs):

- Resident satisfaction
- Visitor satisfaction
- Average daily visitor spending (or per-person-per-day spend -- "PPPD spend")
- Total visitor spending

HTA'S PILLARS

HTA is guided by four pillars which are: natural resources, Hawaiian culture, community enrichment, and brand marketing. Its mission is to strategically manage Hawai'i tourism in a sustainable manner consistent with economic goals, cultural values, preservation of natural resources, community desires and visitor industry needs.

PILLAR I: NATURAL RESOURCES

The natural resources found throughout the Hawaiian Islands are some of the most precious in the world, located in Earth's most unparalleled environments, and among Hawai'i's greatest assets as a travel destination. HTA supports a variety of environmental programs and initiatives in partnership with communities statewide – as well as federal, state and county agencies – to protect Hawai'i's natural resources today and preserve them for future generations. We understand that our natural resources are the source of our success as a community and as a world-class visitor destination.

Highlights:

Aloha 'Āina (Natural Resources) Program



HTA's Aloha 'Āina program is focused on the lasting value of stewardship by responsible community-based entities with an emphasis on 'āina-kanaka (land-human) relationships and knowledge. The collective objective is to manage, conserve and revitalize Hawaii's natural resources and environment. HTA provided \$2,081,000 in funding through the Aloha 'Āina program to support 34 community-created initiatives statewide in their efforts to maintain, preserve and protect Hawai'i's natural environment. This is an increase of total funding of the

program by \$957,000 compared to 2019. Due to the budget impacts caused by COVID-19, the overall value of each project's award was reduced by 50% in May 2020. This reduced the total funding amount to \$1,076,000 and 34 total active contracts for the Aloha 'Āina program. A full list of [Aloha 'Āina awardees](#) can be found on the HTA website.

DLNR Partnership

HTA continues to partner with the State Department of Land and Natural Resources (DLNR) to enhance its efforts to protect Hawai'i's environment from ma uka to ma kai (from the tops of our sacred mountains to the waters that give us life). The Division of Forestry and Wildlife (DoFAW) has a current statewide inventory of 128 trail-and-road features spanning approximately 855 miles. HTA has helped to enhance the visitor experience for some high-use areas, such as Manoa Falls trail on O'ahu. With the dramatic increase in trail use, DLNR must act and find ways to manage our resources to keep up with the rising visitor counts and increasing demand. HTA remains a committed partner to support their efforts but recognize it is DLNR who must act. In 2020, HTA provided \$663,000 in funding for statewide DLNR projects to maintain, preserve, and protect Hawai'i's natural resources and environment.



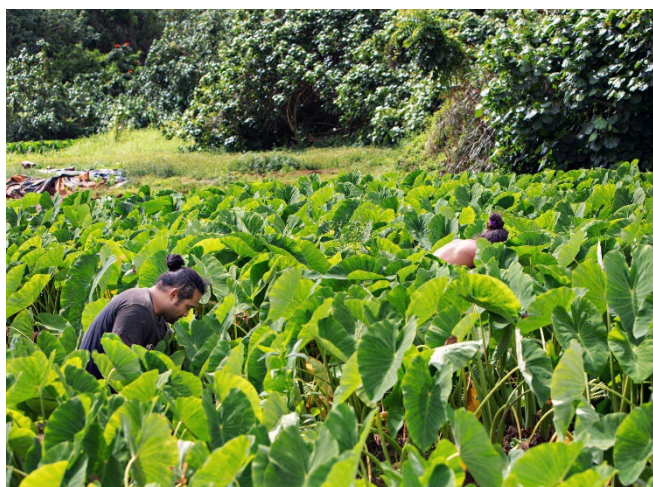
PILLAR II: HAWAIIAN CULTURE

Native Hawaiian culture is at the heart of our islands' uniqueness. The spirit and significance of the Native Hawaiian culture is integrated into every element of HTA's programs to support Hawai'i and its people. There continues to be a renaissance in Hawaiian language usage and practitioners of Native Hawaiian culture within the tourism industry. HTA is committed to supporting programs perpetuating the integrity of the Native Hawaiian culture through unique and genuine visitor experiences that differentiate Hawai'i from other destinations worldwide.

Highlights:

Kūkulu Ola Program

Founded on the value of *ma ka hana ka 'ike* (in working one learns), the Kūkulu Ola program is partnering with awardees who enhance, strengthen and perpetuate the Hawaiian culture. HTA Provided \$1,535,000 in funding through the Kūkulu Ola Program to support 43 community-created initiatives statewide perpetuating Hawaiian culture. This is an increase of total funding of the program by \$312,000 compared to 2019. Due to the budget impacts caused by COVID-19, the overall value of each project's award was reduced by 50% in May 2020. This reduced the total funding amount to \$680,100 and 33 total active contracts for the Kūkulu Ola program. A full list of Kūkulu Ola awardees can be found on the HTA website.



Native Hawaiian Hospitality Association

HTA and the Native Hawaiian Hospitality Association (NaHHA) continue to build stronger ties between the Hawaiian community and the tourism industry. NaHHA was founded in 1997 to help shape the future of Hawai'i tourism by utilizing Hawaiian cultural values as the foundation for business development and leadership through consultation and education, and to provide opportunities for the Native Hawaiian community. NaHHA provides cultural resources for HTA and hosts the annual KA HUINA conference. KA HUINA 2020 showcased project-leaders that

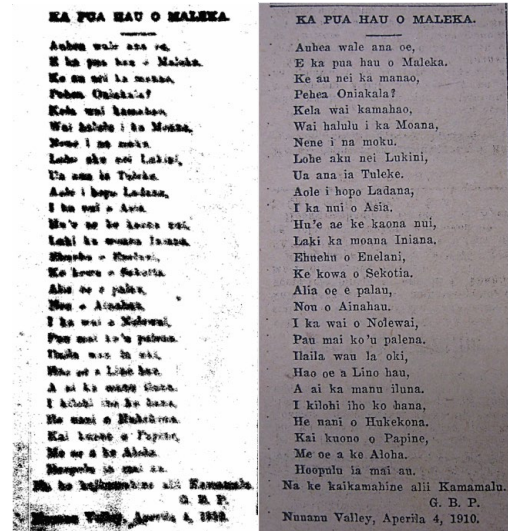
converge at the intersection of Hawaiian tradition and innovation. As a result of the COVID-19 pandemic HTA requested that all in-person trainings and workshops be postponed or cancelled. Shortly after that request was made, NaHHA developed a process to conduct limited trainings online. HTA staff finalized a workplan for 2020-2021.

‘Ōlelo Hawai‘i

HTA continued to integrate ‘ōlelo Hawai‘i (Hawaiian language) into HTA’s daily business to support its status as an official state language. HTA’s monthly board meeting agenda is posted in both Hawaiian and English. In addition, HTA published a Hawaiian translation of the 2020-2025 HTA strategic plan. It is the first document of its kind presented in the Hawaiian language by an agency of the State of Hawai‘i. It is published in soft copy only and is posted to the HTA website alongside the English version.

He Aupuni Palapala: Preserving and Digitizing the Hawaiian Language Newspapers

HTA in partnership with Bishop Museum is working on this project to conserve, rescan and digitize over 100 Hawaiian language newspapers which were published between 1834-1948. The collection covers an estimated 1 million letter head sheets with over 56 ethnographic subject headings. The State of Hawai‘i benefits to support programs that preserve and increase access to rare and historical Hawaiian language newspapers to further the understanding and knowledge contained therein. By making readily available these important documents for education, research, and preservation, the project will provide the state with a completely unique and robust resource for Hawaiian language learners and workers to strengthen ‘ōlelo Hawai‘i.



‘Iolani Palace Repairs



Recognizing the cultural and historical significance of ‘Iolani Palace to kama‘āina and malihini alike, HTA provided support to support the removal of bees from the palace's façade and walls and to make urgent repairs to the coronation stand. Both projects will result in a safer experience to visitors of the site as well and ensure the preservation of the structures for generations to come.

Online Pop-Up Mākeke 2020

HTA helped to launch the first Online Pop-Up Mākeke, organized by the Council for Native Hawaiian Advancement (CNHA). In response to the statewide pandemic, the Pop-Up Mākeke was established as a way to support Hawai‘i's small business owners, particularly our Native Hawaiian-owned businesses who depend heavily on community events, gatherings, craft fairs, and farmers markets. Over the course of eight (8) weeks, the Pop-Up Mākeke sold nearly 11,000 items for over 100 vendors and grossed over \$324,000 in sales.



Native Hawaiian Festivals and Events



HTA annually supports important and iconic Native Hawaiian festivals through its Hawaiian Cultural Affairs & Natural Resources programs. These festivals, and others like them, are vital to perpetuating Hawai'i's indigenous culture among residents of all ages and visitors who travel from around the world to experience the authenticity of the Hawaiian Islands. HTA is committed to supporting cultural practitioners, musicians and artists who share its dedication to enhance widespread public awareness of Hawai'i's native culture through a greater understanding of its significance to Hawai'i's future.

Festivals and events HTA supported in partnership include the following:

- Prince Kūhiō Festival*
- Merrie Monarch Festival*
- May Day (statewide)*
- King Kamehameha Celebration (statewide)*
- 13th Festival of Pacific Arts & Culture (FestPAC)
- Prince Lot Hula Festival*
- Aloha Festivals (statewide)*
- Na Hōkū Hanohano Awards*
- Duke's Ocean Fest Waikīkī Premier Ocean Sports Festival*
- 2020 IVF Vaa World Sprints Championship*
- The Pailolo Challenge*
- Queen Lili'uokalani Long Distance Outrigger Canoe Race*
- Nā Wāhine o Ke Kai Canoe Race*
- Moloka'i Hoe Canoe Race*
- 28th Celebration of the Arts*
- 45th Annual Queen Liliuokalani Keiki Hula Competition*
- 93rd Annual Lei Day Celebration*
- Eo e 'Emalani*
- Steel Guitar Festivals*

*Due to the COVID-19 pandemic restrictions on large gatherings, these festivals and events were cancelled in 2020.

The following Native Hawaiian Festivals and Events were able to pivot and execute virtual events with HTA's support:

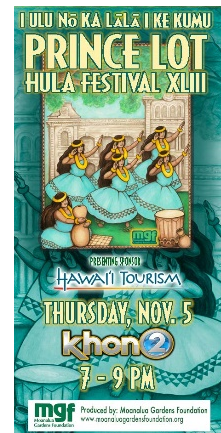
Hawaiian Airlines May Day 2020: Aloha 'Āina:



Gripped by the growing developments of COVID-19, event organizer, Kāhuli Leo Le'a partnered with Hawaii News Now to produce "Hawaiian Airlines May Day 2020: Aloha 'Āina," transitioning the live event into a TV broadcast. Viewers were able to experience the annual Lei Day celebration from the comfort and safety of their homes. HTA along with Hawaiian Airlines were this year's co-title sponsors.

Prince Lot Hula Festival 2020

HTA continued to support the Moanalua Garden Foundation as the Presenting Sponsor of the Prince Lot Hula Festival. This year a pre-recorded "Virtual Festival", aired in November, filmed at the historic Hānaiakamalama (Queen Emma Summer Palace) featured eleven hālau in an inspiring program of hula with special messages of aloha from each kumu. Founded in 1978, the festival honors Prince Lot Kapuāiwa, who helped reprise hula in Moanalua and reigned as Kamehameha V from 1863 to 1872. The program showcased a mixture of both hula kahiko and 'auana with hālau performing at various locations at the Queen Emma Summer Palace in compliance with State and County COVID-19 guidelines.



Kāhea Harbor Greetings Program



The Kāhea Cruise Ship Greeting Program showcases Hawai'i's Aloha Spirit and contributes toward ensuring a positive first and last impression of the Hawaiian Islands for cruise visitors. HTA supports this program in partnership with the Kaua'i Office of Economic Development, Lahaina Town Action Committee, Destination Hilo and Destination Kona Coast. In 2020, the Kahea program continued hosting Hawaiian entertainment, cultural demonstrations and other activities greeting cruise ship visitors at

Nāwiliwili, Lahaina, Hilo and Kailua-Kona harbors until the program was suspended in March due to the COVID-19 pandemic.

Resort Area Hawaiian Culture Initiative

The Resort Area Hawaiian Culture Initiative showcases Hawai'i's Aloha Spirit and contributes toward ensuring authentic Hawaiian entertainment and cultural demonstrations are hosted in the resort areas of Waikīkī, Lahaina, Hilo, and Kailua-Kona for visitors and locals to enjoy. HTA supports this program in partnership with The Waikīkī Improvement Association, The Lahaina Restoration Foundation, Destination Hilo and Kailua Village Business Improvement District. In 2020, HTA supported this initiative until activities were suspended in March due to the COVID-19 pandemic.



PILLAR III: COMMUNITY ENRICHMENT

Community Enrichment Program

The Community Enrichment Program (CEP) funds a diverse array of festivals, events and year-round programs in support of culture, culinary, education, health and wellness, nature, agriculture, sports, technology and voluntourism. They are often highly attended by Hawaii's residents. Funding recipients include nonprofit groups, community organizations and businesses with not-for-profit events. Of the 92 CEP-awarded projects with FY 2020 funds,

- Five projects were completed in Q1 2020 (Pow! Wow! Hawai'i (O'ahu), E Kanikapila Ka Kou (Kaua'i), Waimea Town Celebration (Kaua'i), Ka Moku O Manokalanipō Pā'ani Makahiki (Kaua'i), and Maui Whale Festival (Maui).
- 78 CEP contracts were either terminated or cancelled due to COVID-19 and lack of funding.
- 10 events and two projects will be completed by the end of 2020.
 - 10 events that HTA continued to fund were ranked in the top three by the CEP Evaluation Committees. These projects are especially meaningful and can uplift the community during these difficult times. They can also be enjoyed by potential visitors. All but one of these events will be virtual events. The events are: Ka'ū Coffee Festival (Hawai'i Island), Slack Key Guitar Festival (Hawai'i Island, O'ahu, Maui, and Kaua'i), Gabby Pahinui Waimānalo Kanikapila & The Aloha Shirt Festival (O'ahu and Hawai'i Island), Okinawan Festival Virtual Experience (O'ahu), 'Ukulele Festival (O'ahu), Hawai'i Food & Wine Festival (O'ahu, Hawai'i Island and Maui), and Kōloa Plantation Days (Kaua'i).
 - The two projects are the Lāna'i Guide App Enhancements and Haleiwa Interpretative Signage Project and Walking Tour Map.



Ki-ho'alu Foundation
 "A Virtual Event" Presents "A Virtual Event"
 24th Annual
 HAWAII TOURISM

Hawaiian
**SLACK KEY
 FESTIVAL**
"Kona Style"

Saturday
August 22, 2020
1:00PM - 5:00 PM

Featuring:

Watch The "Live" Webcast On Our
 Facebook Page or our YouTube Channel
 facebook hawaiian slack key guitar festival home
https://bit.ly/hawaiian_slackkey
 #HawaiiTourism

Funding Provided By Hawaii Tourism Community Enrichment Program

Hawaii Agri-Tourism Initiative

The free-of-charge Hawai'i Agri-Tourism Webinar Summer Series was held from July 21 through August 6. HTA partnered with the University of Hawai'i's College of Tropical Agricultural & Human Resources – GoFarm Hawai'i, Hawai'i Agritourism Association and O'ahu Resource Conservation & Development Council (ORCD) to conduct these webinars. These educational workshops are geared towards farms/small businesses/organizations that are interested in expanding or enhancing their agritourism venture. Topics included 1) Market Opportunities by county, 2) Compliance and Planning, and 3) Statewide Grant Application Information. Over 300 people participated in the free webinars. To view the recorded webinars visit: <https://gofarmhawaii.org/2020-hawaii-agri-tourism-webinar-summseries>

Hawaii Agri-Tourism Webinar Summer Series 2020

OFFERING \$3,000 MINI-GRANTS

Webinar Series Overview:
This series provides a crash course in Hawai'i agri-tourism across the state of Hawai'i, starting with island-based updates & market opportunity panels for each county. Sessions on compliance & planning will follow and grant application preparation for those eligible and interested.
• Moderated by Poma'i & Lani Weigert in collaboration with HTA, GoFarm Hawai'i & Hawai'i Agritourism Association
TIME: 10A-12P
COST: FREE
TO REGISTER GO TO: WWW.GOFARMHAWAII.ORG

Grant Eligibility:
You or a member of your business must register and attend/view the following 3 webinars:
1) Market Opportunity for YOUR County
2) Compliance & Planning
3) Grant application process.
Collaborations and partnerships will be favored in the application process so come prepared to cultivate new ideas and enhance solutions. Open to for-profit & nonprofit Hawai'i-based businesses & organizations looking to collaborate with agriculture & tourism.

Market Opportunity Schedule:

Date	County	Speakers
7/21	Hawaii Island	Hawai'i Tourism Authority, Caroline Anderson Hawai'i County Office, Linda Gaudin Hawai'i Farm Trails, Kalia Menden & Dr. Angela Farnsworth O'ahu County Office, Elin Koo & Aia Kunkel Big Island Inn, Wilfred O'Neil
7/23	Kauai	Hawai'i Tourism Authority, Caroline Anderson Hawai'i County Office, Linda Gaudin Hawai'i Farm Trails, Kalia Menden & Dr. Angela Farnsworth Lydgate Farms, Will Lydgate
7/28	Maui County	Hawai'i Tourism Authority, Caroline Anderson Maui County Office, Lisa Pridemore Hawai'i Farm Trails, Kalia Menden & Dr. Angela Farnsworth Maui Through, Mary Bethon Maui & Lanai Estate, Denise O'Donohue
7/31	Oahu	Hawai'i Tourism Authority, Caroline Anderson Hawai'i County Office, Linda Gaudin Hawai'i Farm Trails, Kalia Menden & Dr. Angela Farnsworth Kali & Pono, Heather Miller Kali & Pono, Heather Miller

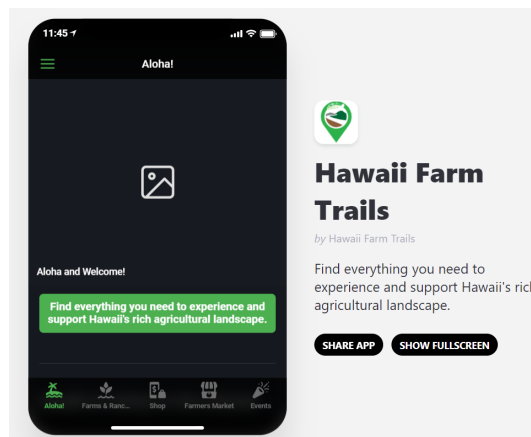
Compliance & Planning:
8/4

Grant Application:
8/6

Also in partnership with GoFarm Hawaii and ORCD, HTA provided \$45,000 to 15 local farmers and businesses to support the development of innovative agri-tourism operations in Hawaii of up to \$3,000 per organization looking to expand their agri-tourism businesses. Local businesses were selected through a competitive application process after receiving training from GoFarm Hawaii and the Hawaii Agri-Tourism Association (HATA) via the 2020 Hawaii Agri-Tourism Webinar Summer Series:

- 21 Degrees Estate (Oahu)
- Beer Lab HI (Oahu)
- Bird and Bee Hawai'i (Hawaii Island)
- Hamakua Harvest (Hawaii Island)
- Hana Farms (Maui)
- Hawaii Ulu Cooperative (Hawaii Island)
- Keiki and Plow (Oahu)
- Ko Hana Rum Distillers (Oahu)
- Lydgate Farms (Kauai)
- Maui Dragon Fruit Farm (Maui)
- Nalo Meli Honey (Oahu)
- Opala Foods (Oahu)
- Punahale Provisions (Oahu)
- Tea Hawaii & Company (Hawaii Island)
- Yee's Orchard (Maui)

HTA funds are also being used to expand the Hawai'i Farm Trails website and app (<http://www.hifarmtrails.com>) to market agri-tourism activities and events on a statewide level so that residents and visitors will have a platform to seek out agritourism ventures. HTA funds are also being used to update GoFarm Hawaii's Hawai'i AgBusiness Guidebook as it relates to agri-tourism.



Partnership with Hawai'i Alliance of Nonprofit Organizations (HANO)

HTA partnered with HANO to build the capacity of Hawaii's nonprofits. Originally these were intended to be in-person workshops held on Kaua'i, O'ahu, Maui, Moloka'i, and Hawai'i Island. However, due to COVID-19, HTA and HANO pivoted and held free webinars. The topics were also revised to address issues and concerns that nonprofits are facing during these uncertain times. Below are the titles and descriptions of the webinars:

- **Rethinking Fundraising and Special Events During COVID-19** webinar. Social distancing orders have made it difficult for nonprofits to run many in-person fundraising/special events that are critical to supporting their missions. The panelists shared lessons learned in pivoting to virtual events and creative solutions if you can't go virtual. The session included talk story time for Q&A.
- **Nonprofit Finance: Strategies for Navigating During COVID-19** webinar. Panelists, Catha Lee Combs, CPA, Managing Director, Wikoff Combs & Co., LLC and KilikiniMahi, Principal, KM Consulting, shared best practices in financial management that are even more critical during the COVID-19 pandemic and discuss tips and tools for compiling and visualizing critical financial information to share with their board and funders. The session included talk story time for Q&A and sharing lessons learned.



The webinars were also recorded and are available on HTA and HANO's websites. Approximately 300 people attended the webinars.

Festivals & Events Workshops

HTA, has a partnership with the International Festivals & Events Association, to conduct a series of workshops throughout the state targeted at festivals and events planners and organizers.

These workshops are geared toward enhancing the success of events/projects in the areas of revenue generation, developing successful volunteer programs, succession planning, risk management and event safety. This year's workshops were cancelled due to COVID-19.



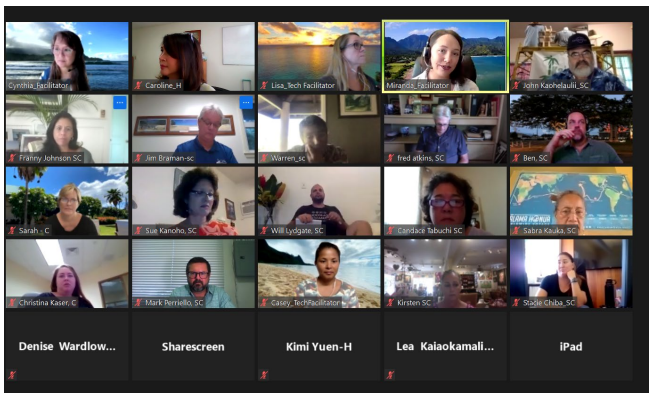
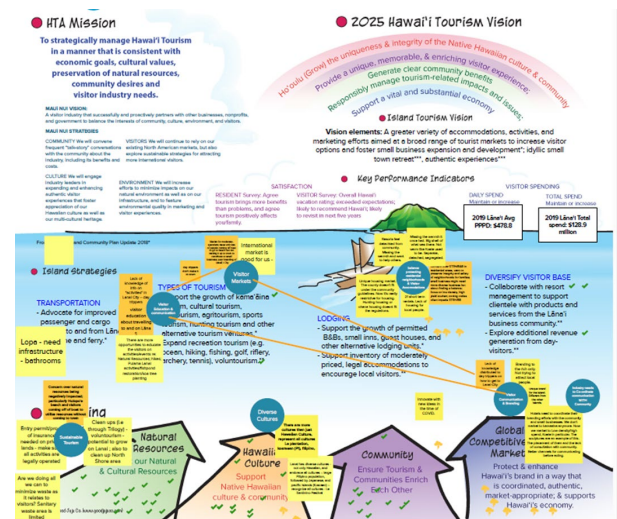
75th Commemoration of Ending of World War II

September 2, 2020 marked the 75th anniversary of the ending of World War II, a significant date in world history. HTA funds were used to support education and community engagement of the youth in this historic event. Funds were also used for the creation of content on social media to tell the historic stories with a focus on the WWII veterans, and digital marketing.



Community Based Tourism Program

HTA, in partnership with the counties and the respective island visitors bureau, will develop Destination Management Action Plans (DMAPs) for Kauai, Maui Nui (Maui, Molokai and Lanai), Oahu and Hawaii Island. This work will help in recovery efforts and rebuild tourism. These are action plans, with the foundation of the plans being HTA's Strategic Plan and the Counties' Tourism Strategic Plans. The DMAPs will prioritize actions that meet the communities' values and lifestyles, minimizes impact, provides a positive experience for residents and visitors alike, and bring the desired economic and social benefits to its residents. This is a collaborative process between the HTA, County's Economic Develop Office, respective Visitors Bureau, the community, visitor industry, and other community organizations and industry sectors.



Over the course of four months, HTA worked with the Counties of Maui and Kauai and the respective island visitors bureaus in the creation of the DMAPs. Four steering committee meetings will take place, in addition to community meetings to gather further input. Over 400 attended the community meetings. The community also had the opportunity to provide feedback through an online webform. The Steering Committee met via Zoom, and professional meeting facilitators assisted with bringing out the members' ideas.

The HTA and Counties, using the Steering Committee's proposed actions and community input, to craft the plan. Ideas and actions are from them, and not the HTA or County. The draft DMAP will be approved by the HTA board in December 2020. The final approved DMAP will be shared with the public in January 2021. Implementation of the DMAPs will also begin in January.

For Hawaii Island's DMAP, HTA worked with the County of Hawaii over the course of three months. The process is somewhat similar, with a few exceptions. The County of Hawaii developed four cohorts, or action-specific working groups, which represent the four goals of its Tourism Strategic Plan. A steering committee representing members of the community, visitor industry and other sectors are part of one of the cohorts that will support the implementation of the DMAP.

Oahu's DMAP process will start in January 2021.

Career Development

HTA continues to address the changing needs of today's tourism industry workforce by collaborating with educational institutions to make training available to residents working in travel and hospitality, as well as to help enhance their quality-of-service skills. Sustaining tourism's success also depends on developing the next generation of Hawai'i's workforce, at all levels of employment, to carry the industry forward.

Hawai'i Tourism Ho'oilina Scholarship

HTA established the Hawaii Tourism Ho'oilina Scholarship Fund which awards scholarships to college-bound Hawaii High School Seniors based on demonstrated academic achievement, leadership skills and an expressed interest in pursuing a hospitality, tourism or culinary education and career. The HTA partnered with the University of Hawaii at Manoa, School of Travel Industry Management at Shidler College of Business (UHTIM) and the University of Hawaii West Manoa (UHWO) to assist in the promotion and execution of the Ho'oilina Scholarship. In Spring 2020, eight Hawaii public high school seniors who selected to major in the tourism/hospitality/culinary field were awarded four-year full-tuition scholarships to the UHTIM. Two Hawaii public high school seniors were awarded four-year full-tuition scholarships to the UHWO's Business Administration Division. One community college student was selected to receive a two-year scholarship to the UHWO's Business Administration Division. Below is the list of the 2020 Ho'oilina Scholarship recipients and the high schools they graduated from:



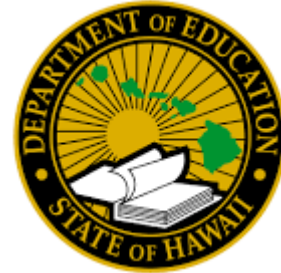
- Camille Castro, W.R. Farrington High School
- Makena Cowan, Lahainaluna High School
- Tiaina Failauga, Aiea High School
- Korey Hanaike, King Kekaulike High School
- Megan Ibara, Kaiser High School
- Cody-John Sakamoto, H.P. Baldwin High School
- Quinn Sumida, Roosevelt High School
- Vivian Thach, Kaimuki High School
- Jay Ann Torres, Waipahu High School
- Loryn Garcia, Farrington High School
- Celine Daclison, James Campbell High School, Leeward Community College

LEI (Lead, Expose, Inspire) Program

LEI is an HTA-sponsored workforce development project created by ClimbHI to inspire Hawai'i's youth to select careers in Hawai'i's visitor industry by providing them with the means to achieve success. The program started in 2011 and has grown to more than 1,000 high school students, 100 college students, and more than 100 businesses participating. This year's LEI events were cancelled due to COVID-19.

Partnership with Department of Education

HTA is assisted the Hawaii State Department of Education (DOE) by offering highschool students the opportunity to obtain a ClimbHI Service Excellence Certificate exclusively designed for DOE's Career and Technical Education program. Nine lessons are provided to student which lead to a certificate from Cornell University's School of Hotel Administration and bringing awareness of Hawaii's Aloha Spirit Law ([§5-7.5] The Aloha Spirit) and an understanding of the Hawaiian values in the law to be able to conduct themselves in accordance with the law and to pass the knowledge on to visitors, so they too conduct themselves in accordance with this Hawaiian law in their every day lives. Service excellence is not industry specific but a life skill that students will use in any career choice. It is anticipated that a little over 200 students will receive their certificate in 2020.



Partnership with University of Hawai'i

The HTA partnered with the University of Hawai'i's Kapi'olani Community College and its sister community colleges on the neighbor islands to offer trainings in the areas of customer service and certification of professional tour guides. In 2020, the trainings were conducted online due to COVID-19. 104 participants were trained, of which 125 certificates and/or certifications were awarded. Some tour guide candidates also received a customer service certificate.



PILLAR IV: BRAND MARKETING

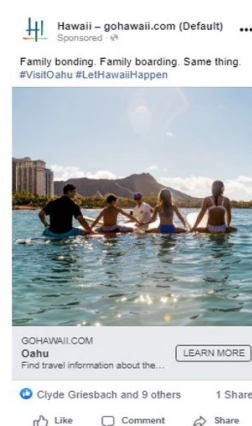
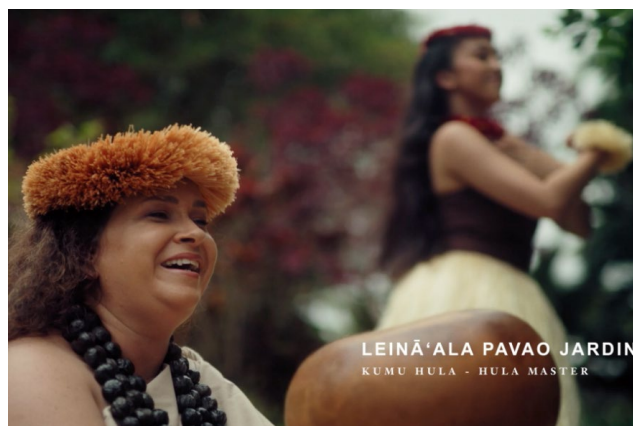
HTA contracts marketing organizations – collectively known as its Global Marketing Team (GMT) – to promote the Hawaiian Islands worldwide. The GMT's coverage in 2020 included the U.S., Canada, Japan, Oceania, Korea, China and Taiwan. Due to the COVID-19 pandemic and our changing fiscal priorities in response to the COVID-19 crises, HTA cancelled contracts for Europe and Southeast Asia markets in April 2020. Additionally, since late March, HTA directed all GMTs to halt advertising and promotions and instead focus on communication, education, and support of HTA crisis management efforts and safety messages, as Hawai'i implemented the mandatory 14-day quarantine and stay at home order. During the last several months, all GMTs have been diligently developing recovery plans with ongoing adjustments made based on the fluid situation both locally and globally. In Mid-September when HTA's new president and CEO John De Fries came on board, all GMTs immediately adopted his "Mālama Mindset" and his vision for a sustainable future of Hawai'i.

UNITED STATES

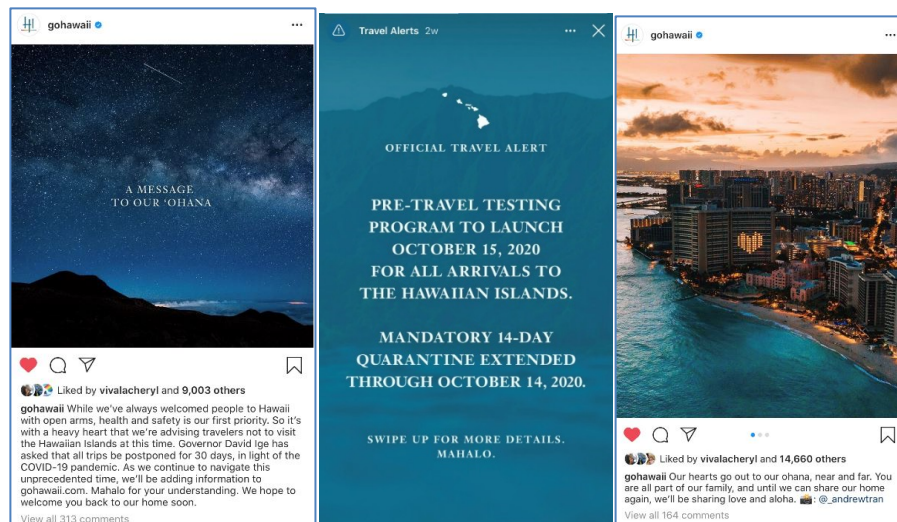
The U.S. West and U.S. East are Hawai'i's two largest source markets for visitors. The U.S. West market includes visitors who travel to the Hawaiian Islands from the 12 states west of the Rockies, and the U.S. East includes all other states. The coronavirus pandemic resulted in suspension of most flights from the mainland U.S. to Hawai'i – YTD September air seats totaled 146,452 compared to 711,856 YTD 2019. The Hawai'i Visitors & Convention Bureau (HVCB) suspended their Hawai'i Rooted digital video campaign during the shutdown and replaced it with messages of support for the local community and first responders and external communication about Hawai'i's 14-day mandatory quarantine. The recovery strategy focused on welcoming back repeat visitors who know the islands and want to Mālama Hawai'i during their visit.

Key Initiatives

- Hawai'i Rooted – Q1.** The best performing custom digital video and editorial assets ran with extended exposure to target markets in January, February and part of March. These video efforts were augmented by advanced television and cinema programs that showcased Hawai'i Rooted stories about the people of Hawai'i. The video-centric plan was further supported with paid social media posts and distribution of Hawai'i Rooted assets that repurposed the video content into a series of quick-hit, paid-optimized video ads for the "This is Hawai'i" campaign designed to promote content pillars of cuisine, culture, and adventure.



- **Shutdown Messaging.** With the mid-March shutdown due to the pandemic, marketing ceased and HVCB shifted to a series of messages:
 - **Aloha from our Home to Yours** utilized email to reach HVCB's subscriber database of Hawai'i travelers. It encouraged them to postpone their trips to Hawai'i and come at a later time when it's both safe for them and safe for our island communities.
 - **Mandatory 14-day Quarantine** utilized social media to geo-target potential travelers in top 11 markets on Facebook and Instagram. It notified prospective travelers about the mandatory 14-day quarantine for all travelers incoming to Hawai'i.
 - **#sharealoha** utilized social media to support organic efforts and widen audience reach on Facebook, Instagram, and YouTube. "While you can't visit us right now, we want to share the spirit of *aloha* from afar to help you cope during this unprecedented time. While we look forward to welcoming you in the future, let's care for each other for the time being."



- **Mālama Hawai'i.** With Hawai'i welcoming visitors once again in mid-October, HVCB launched the Mālama Hawai'i program that invites visitors to stay in a new way -- take the time to really know each island, form a deeper connection with Hawaii's culture, travel mindfully and Mālama Hawai'i. Leave Hawai'i better than you found it and go home better than when you came. The program involved an alliance with HTA, hotels, airlines and other visitor industry partners along with volunteer organizations.



- Meet Hawai'i.** HVCB assumed responsibility for Global Meetings, Conventions, and Incentives which includes off-shore bookings at the Hawai'i Convention Center, managing the MCI sales efforts of HTA's international GMTs and generating single property MCI sales opportunities in the U.S. while the pandemic prompted cancellations of most 2020 bookings and halted most sales activities, HVCB continued to communicate with clients and in October hosted its first ever I MUA HAWAII digital tradeshow that showcased Hawai'i's recovery blueprint for a safe and healthy destination for future groups. Buyers met one-on-one with Hawai'i hospitality partners to discuss future programs for 2021 and beyond.

CANADA

Canada is the second largest international market for visitors to Hawai'i. Since March, the Canadian government implemented a ban advising against non-essential international travel and a mandatory 14-day quarantine for all travelers arriving in Canada including residents. The tourism industry adapted by creating insurance policies covering COVID-19 related illnesses while outside of Canada, piloting rapid testing programs, and coordinating with health agencies to provide safety measures to allow travel to re-open. HTA works with Hawai'i Tourism Canada (HTCAN) to stimulate demand and retain market share while targeting key segments. Due to the pandemic, the priorities were to keep Hawai'i top of mind by hosting educational programs, promoting the Hawai'i Destination Specialist Program, and continuing public relations outreach. HTCAN collaborated with airlines and the Department of Health to have testing protocols approved to allow Canadians to visit Hawai'i without the need to quarantine and to assure airlines reinstate their routes.

Key Initiatives

- Baxter Agents' Choice Awards.** During the "Virtual 21st Annual Baxter Agents' Choice Awards", Hawai'i was presented for the second year in a row the award for Favorite Global Honeymoon Destination for 2020 and Hawai'i Tourism Canada was selected as the Favorite Tourism Board (Organization) for the Asia Pacific region. The awards were voted by more than 7,000 Canadian travel agents.



- Aloha Canada Trade Mission.** The Aloha Canada trade mission took place virtually on December 3rd which is the most important travel trade and PR event hosted by HTCAN in the Canadian market. HTCAN reached out to travel advisors, MCI and travel trade media from across Canada. The event highlighted Hawai'i industry partners who had the opportunity to interact in real time with the travel agents. The Island Chapters conducted webinars and a virtual trade show showcased the partners' products. Aloha Canada included sessions lead by cultural practitioners that shared the meanings of Aloha and Ho'okipa to the participants. Kuleana videos were also shown during the event.



- Educational Campaign.** HTCAN launched an educational campaign for travel agents on the Spoiled Agent platform including Facebook live. The campaign consists of six different webinars, and the first one was presented by the Native Hawaiian Hospitality Association sharing the meaning of Aloha and Ho'okipa. The other webinars will be presented by the Island Chapters, highlighting the cultural aspects and unique attributes of their respective islands. The first two webinars held in the fall were well received, training more than 330 agents. The webinars also promoted the Hawai'i Destination Specialist Program, encouraging agents to enroll in the educational programs.



JAPAN

The Japanese market to Hawai'i was moving at a favorable pace in January and February but started to decline from March as the effects of the COVID-19 pandemic became widespread. Total visitors for 2020 are currently at an 82% decline vs 2019 levels. Because the Japanese market has the potential for fast recovery with Hawai'i continuing to be a major destination for consumers, HTJ has been making effective preparations for the resumption of travels through continued initiatives to keep the destination at the top of mind amongst Japanese consumers. For core branding messages in 2020, although responsible tourism related messages segmented for each target audience group was planned, the global pandemic increased priority and shifted emphasis to the sharing of relevant information. High-level branding and strategies continued to be based upon the 4 pillars of HTA from 2019. Moving forward, HTJ will continue the sharing of Hawai'i as a safe destination under the new norms presented by COVID-19 while continuing promotion of responsible tourism.

Key Initiatives

- Surfing Promotions.** HTJ began the surfing branding promotion with the official selection of the sport to be included in the 2020 Olympics collaborated with partner entities including Bishop Museum to utilize their surfing exhibition and translate it into Japanese to share with the market. Positive results were recorded from the press release event in Japan for the promotions with special guests including Governor David Ige and former HTA President and CEO Chris Tatum. In terms of marketing initiatives through the branding initiatives for surfing, those are all in alignment with the two of the pillars of HTA of natural resources and culture. Also, a professional Japanese surfer was appointed for the campaign to enhance messaging of the rich history and culture of surfing and its roots in Hawai'i amongst Japanese consumers.



- COVID-19 Response.** HTJ maintained frequent communications with stakeholders, partners and governmental organizations to share updates and other relevant information in relation to the COVID-19 pandemic as they became available while also discussing measures concerning the reopening of tourism. Also, HTJ developed a special COVID-19 website to provide a platform where all relevant information can be found by consumers and travel agents alike. In addition to that, HTJ enhanced education opportunities for travel agents to leverage upon

their time spent away from dealing with sales of products. Some initiatives were carried out together with local stakeholders to raise awareness of the initiatives being taken locally to the Japanese travel industry.



- Digital Marketing.** HTJ enhanced branding messaging as the tourism industry came to a standstill to maintain Hawai'i as a top destination amongst consumers' minds through the use of owned media including the CRM system, websites, social media, etc. HTJ also frequently shared updated information, contents within the knowledge bank and developed new programs under the "Ouchi de Hawai'i" (Hawai'i from home) campaign. Examples of new initiatives include virtual Hawai'i contents and live talk shows with special guests and segmented marketing initiatives were enhanced with new messages to specifically target each audience group to raise awareness and maintain the destination's significance amongst consumers.

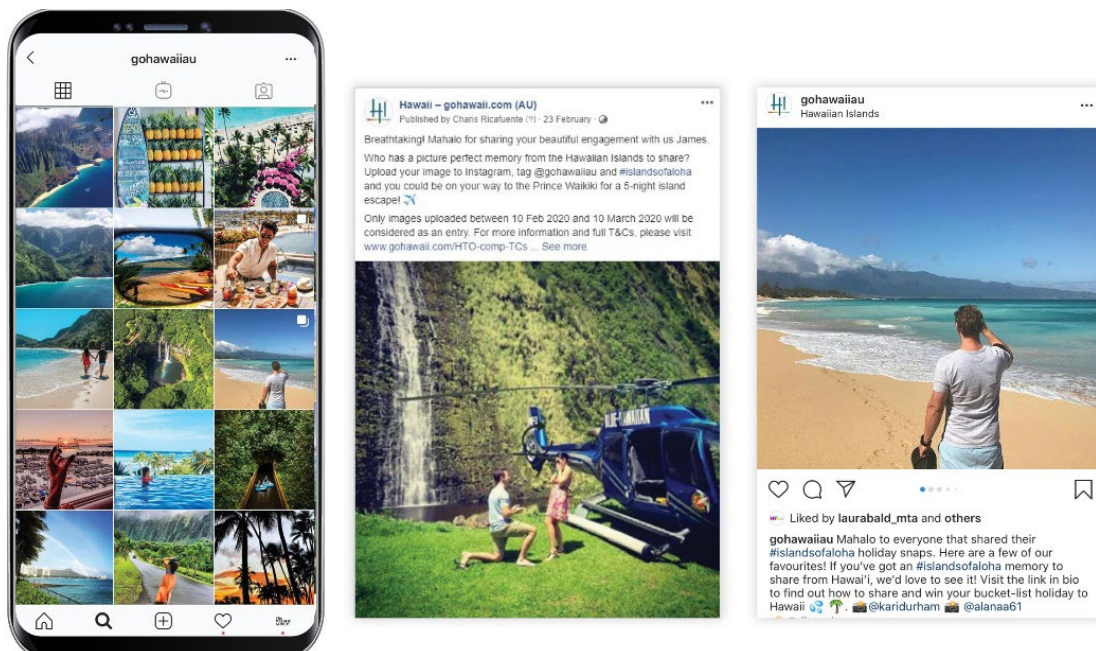


OCEANIA

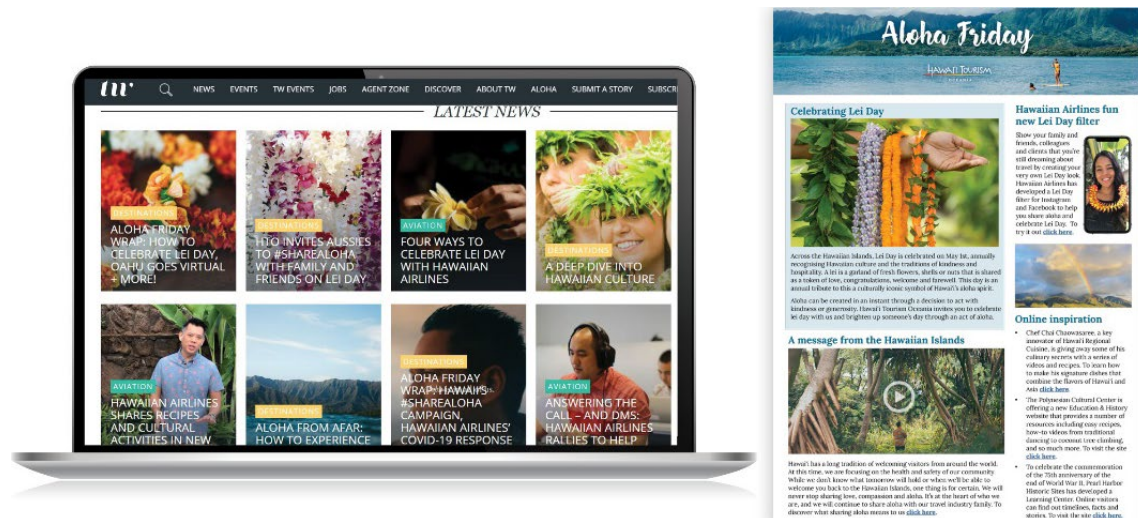
The Oceania market of Australia and New Zealand was impacted less than most by COVID-19. This was largely due to a very quick and strict response by the governments around closing borders, imposing lockdowns and requiring managed 14-day isolation for all arrivals. This approach helped to lessen both the health and economic impacts and will position the market well for international travel. HTO's branding is aligned with HTA's four key pillars and a brand proposition based on Breathtaking Landscapes; Natural Beauty; Authentic Culture; and Responsible Tourism - connected by the Aloha Spirit. HTO's recovery plan is built around the opportunity to connect Hawai'i with a traveller who has a fresh outlook and values, seeking authenticity, enrichment, and a connection to a place through the local community, culture and natural environment. 2020 began with some high impact initiatives, which fortunately should have long-term impact as we look towards 2021.

Key Initiatives

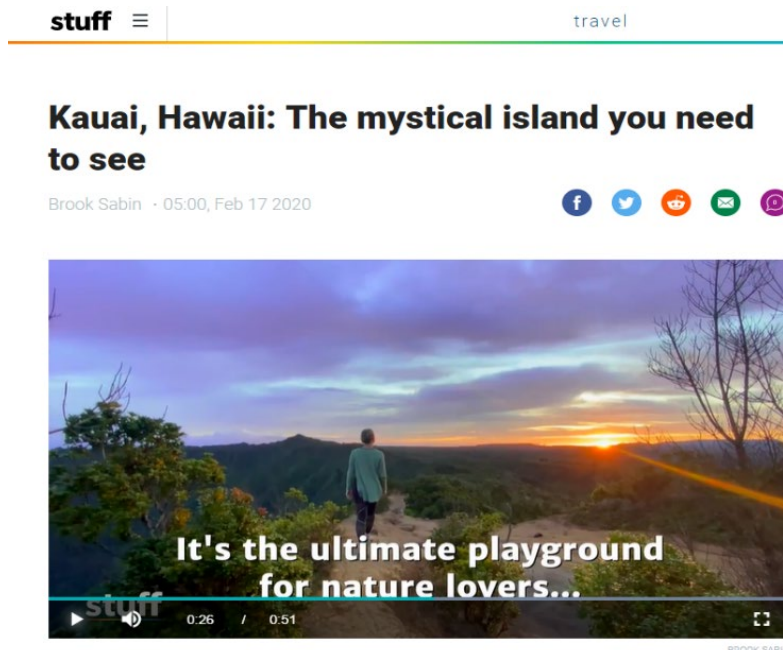
- Social media campaign.** To harness the power of user generated content and its highly engaged social media audience, HTO launched a four-week long Instagram campaign. HTO encouraged our audience to post their own photos of Hawai'i for a chance to win prizes. Our Team amplified the 'voice' of our followers by resharing UGC that included our new hashtag #islandsofaloha via Instagram stories, and in feed posts on Facebook and Instagram. The campaign was promoted on HTO's digital channels, along with paid and organic social media activity. The activity achieved strong results receiving 3.7+ million impressions, 253,608 engagements and 20,568 clicks.



- Trade relations.** As part of our 'always on' trade communications strategy HTO partnered with trade media channels across Australia and New Zealand to publish native content on an Aloha Friday section each fortnight. This has allowed HTO to keep Hawai'i front-of mind and provide updates to the Oceania travel industry during the pandemic. This Aloha Friday section featured inspirational destination content, news and events, updates provided by Hawaii industry partners and HTA. HTO worked with the following trade channels: Travel Weekly AU (14,000+ reach), Travel Daily AU (35,000+ reach) and Travel Today NZ (promoted to 2,500+ industry partners).



- Fairfax media partnership.** HTO partnered Fairfax's online platform stuff.co.nz via travel contributor and influencer Brook Sabin to produce high impact content for the 400,000+ readers and followers. The initiative included hosting Brook in Kaua'i, O'ahu, Maui and Hawai'i Island to create vignettes that showcased in particular the nature and outdoors. Prior to COVID, two islands had been produced (Kaua'i and Maui) and shared with excellent results. We look forward to re-launching the promotion when the time is right.



KOREA

The Bank of Korea forecasts its 2020 GDP growth as negative 1.3%, factoring in the wave of COVID-19 infections. OECD forecasts Korea's GDP growth as 3.1% in 2021. South Korea proposed a record 555.8 trillion-won (equivalent to US\$469.8 billion) budget for 2021 to kick-start a post-pandemic economic recovery. For core branding message, HTK has aligned with HVCB's global branding message, sharing its message to the Korean target audiences through the online platform. It has focused on its 'Share Your Aloha' branding campaign, advising Korean potential travelers to postpone trips to Hawai'i to protect communities and residents of Hawai'i from COVID-19. Once Hawai'i is open for international travelers, HTK will gradually promote its communication plan along with introducing 'Malama' spirit to the market. HTK also has developed a Korea marketing and communication plan to highlight the destination's clean, safe and sustainable tourism environment and targeting respectful travelers from Korea.

Key Initiatives

- Crisis Management in response to COVID-19.** From January at the onset of the outbreak of COVID-19, HTK has been playing its role as a front-line communication channel representing the destination. This involved deploying its real-time crisis management protocols in the local B2C & B2B market. HTK also submitted daily COVID-19 reports to HTA to update the South Korean market situation. For B2B, HTK made regular virtual sales calls to airline partners and regular meetings with industry partners to share up-to-date airlift information in response to COVID-19 and current market status and trends from Hawai'i through industry newsletters. For B2C, HTK delivered up-to-date travel alerts to potential visitors and industry partners in local language including HTA and state government official announcements through GoHawaii KR website and also uploaded social media posts on its owned Instagram and Facebook channels.



[하와이 코로나 19 관련 여행 정보]



*하와이 주 방문객 대상 <코로나 19 사전 검사 프로그램> : 오는 10월 15일부터 하와이 주 <코로나 19 사전 검사 프로그램>이 **미 본토 방문객을 우선으로 실행**됩니다. 한국을 비롯한 해외 방문객은 기존과 동일하게 14일 자가 격리 의무 체제가 적용됩니다.

- Hawai'i Culture & Nature Promotion with Asiana Airlines.** HTK ran an online consumer promotion in partnership with Asiana Airlines in February. It enhanced awareness of Hawai'i as a leading responsible tourism destination in the Korean market. The promotion highlighted clean, cultural and sustainable aspect of Hawai'i by showcasing its unique natural resources and the islands' rich cultural/historical heritages on the multiple media channels of OZ and HTK. The event drew a total of 770 pax and generated 324 flight ticket sales. HTK and Asiana Airlines also pushed a great deal of attention to the website of each local sponsor and their sustainable tourism activities. There were 22,582 Unique Visitors and 25,021 Page Views to Asiana Airlines' promotional webpage. Mobile app push notifications were also sent to 11,079 consumers and 20.9% of receivers opened the promotional page.



- Sustainable Hawai'i - Korea Digital Directors Media Fam.** HTK hosted a Digital Directors Media Fam to O'ahu and Kaua'i on a Sustainable Hawai'i theme in February. By maximizing coverage in leading consumer fashion/lifestyle magazines – Allure, Elle and Cosmopolitan – HTK aimed to introduce responsible tourism trends to Korean consumers with a high interest in culture. Sustainable Hawai'i themed media visit generated seven pages of exposure in eco-friendly special March issues of each magazine and its social media channels generated over 2M impressions, equivalent to \$600, 000 in PR value.



CHINA

Due to the global COVID-19 pandemic, 2020 was a challenging year with stop work orders and budget reductions to the China Major Market Area. Despite the challenges, Hawai'i Tourism China (HTC) stayed focused on its core digital and social media strategy with a branding theme “*Embrace All Imagination*” to showcase Aloha and the Hawaiian Islands to the Chinese audience. When China Eastern Airlines’ Shanghai to Honolulu flights were suspended in February 2020, many Chinese were searching for critical information and travel support. HTC provided updates along with messages of support and aloha to travelers, families and frontline workers through popular digital and social media channels such as WeChat and Weibo. Although there are currently no direct flights from China to Hawai'i, HTC has been active in providing education and awareness of the Hawaiian Islands to Chinese consumers through multiple digital and social media platforms, live webinars and collaboration with leading Chinese OTAs.

Key Initiatives

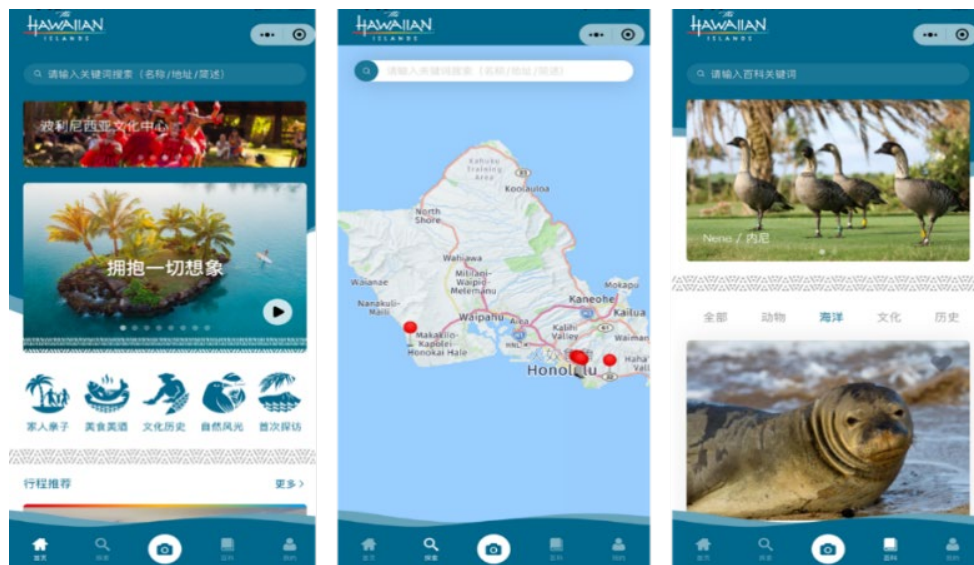
- HTC B2B Live Webinar Training Program.** With a focus on post COVID-19 travel industry recovery for the B2B market, HTC successfully kicked off five online training seminars from March 2020 to April 2020 to educate Chinese travel trade professionals on the Hawaiian Islands. The series of online training focused on general destination information, Hawaiian culture, natural resources, and responsible tourism, via a live webinar platform, achieving a total of 819 participants, 1,080 follow-up viewers and 237 playbacks. Additionally, HTC partnered with leading Chinese travel agencies, UGC platforms and potential MCI corporate buyers such as Unique Travel, Sparkle Tour, Mafengwo, Caissa Tour, and Minstrust to conduct online training. The livestreaming reached over 37,000 page views and more than 4,000 unique visitors.



- HTC and Trip.com Partnership.** HTC collaborated with Trip.com, the leading OTA platform, in its “Recovery V Plan” travel initiative, broadcasting a series of inspirational videos to welcome back travelers to various locations around the world. HTC provided the content for the Hawaiian Islands segment to showcase Hawaiian culture, natural resources, and responsible tourism. HTC also worked with Trip.com to ensure that Aloha is messaged and communicated well in welcoming Chinese tourists to Hawai‘i upon market recovery. Based on Trip.com data, Hawai‘i was ranked in the Top 5 wish list of outbound destinations for Chinese. The campaign underscored people’s confidence in the tourism industry recovery post COVID-19.



- WeChat MINI Program.** WeChat, with over 1.2 billion active users, is a very popular and important communications tool in China. To reach the target consumer and drive awareness of the Hawaiian Islands, HTC developed a WeChat MINI Program providing a convenient online mobile platform to Chinese audiences. The platform content and digital assets were drawn mainly from gohawaii.com, meethawaii.com and HTA’s knowledge bank to maintain brand and cultural integrity when promoting the Hawaiian Islands and to be consistent with HTA’s four pillars: Hawaiian Culture, Natural Resources, Community, and Brand Marketing.



TAIWAN

2020 is an extraordinary year for the whole world. COVID-19 has impacted the travel industry with international border restrictions and safety measures. Taiwan successfully contained the spread of the disease, winning international acclaim. No lockdowns were implemented since the first case was imported. The impact on GDP for Q2 2020 was only 0.6% lower year on year. Although outbound travel was restricted, Taiwan's domestic travel saw increased search in April and travel boom in June. Innovative travel itineraries were developed to accommodate travelers eagerly awaiting to travel internationally again. The core brand message for Hawai'i Tourism Taiwan (HTT) in 2020 is *Hawai'i - Sanctuary of Aloha*. Although the B2C initiatives were suspended due to COVID-19, HTT continued its efforts in upholding partnerships with travel trade, media and consumers in Taiwan, inspiring travelers to keep Hawai'i at the top of their mind when traveling is allowed post COVID-19.

Key Initiatives

- Airlines Meetings and Strategy Planning.** Working closely with China Airlines, Taiwan's national carrier which operates Taipei-Honolulu direct flight services, HTT conducted strategy meetings with China Airlines to discuss marketing initiatives for the Taiwan market, in promoting Hawai'i as a premier vacation destination for FIT & GIT travelers. In addition, HTT worked with Hawaiian Airlines to explore collaborative opportunities to market the Island-Hopping itinerary to Taiwanese travelers. HTT also kept up its relationship with EVA Air, another of Taiwan's major air carriers, to create potential partnerships on campaigns and travel products to bring Taiwanese travelers to Hawai'i.



HTT & ANTOR Visit China Airlines



HTT & ANTOR Visit EVA Air



HTT & Hawaiian Airlines Networking

- Travel Trade Engagements & Education.** HTT continued to build relationships bringing Aloha to partners during the challenging COVID-19 period. Regular meetings, phone calls, conference calls were conducted with Taiwan's top wholesalers and travel agencies, including but not limited to Phoenix Tours, Lion Travel, SET Tour, Cola Tour, ACITS, Yes Trip and American Express. In partnership with Pacific Asia Travel Association (PATA) and Taipei Association of Travel Agents (TATA), HTT conducted a series of B2B educational seminars introducing the Hawaiian Islands, themed experiences, Hawaiian culture, Travel Pono, Hawai'i Rooted, and Share Aloha travel tips. Trade partners were encouraged to sign up for Hawai'i Expert Training Program to become a specialist for destination Hawai'i.



HTT Training at PATA



HTT Training at TATA



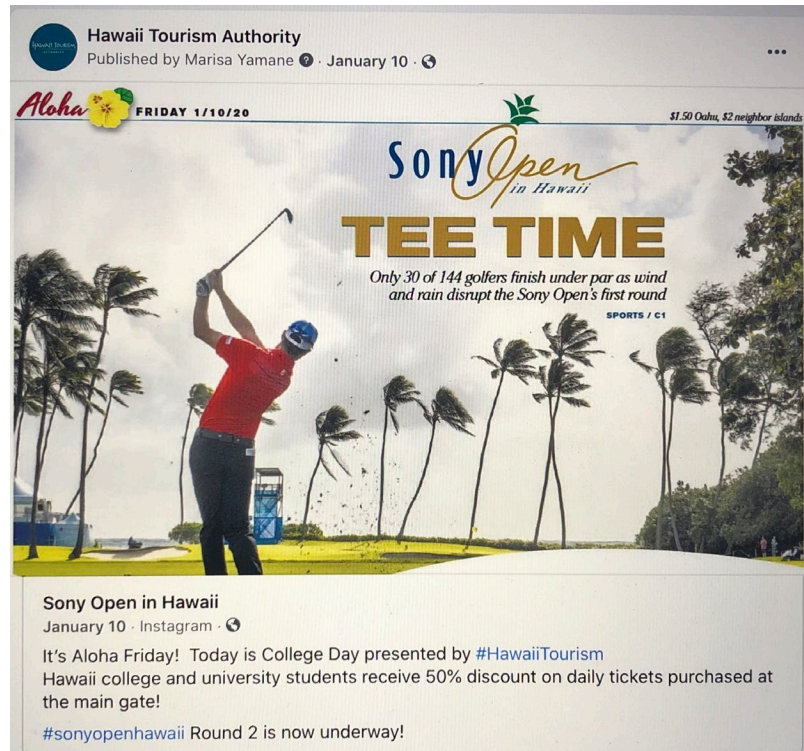
HTT Met with Yes Trip

- PR & Social Media Marketing.** HTT manages multiple social media channels including Facebook, Instagram, YouTube and Pixnet (Taiwan's blog). During the outbreak of COVID-19, HTT supported HTA's crisis communication by timely sharing Hawai'i updates including the Share Aloha video and Live Aloha Lights in Waikīkī through the social channels. In September, HTT resumed regular social media postings to ramp-up for Hawai'i's re-opening of trans-pacific travel. Posting contents and messages are to highlight HTA's four pillars and the concept of travel pono with mālama mindset. Additionally, HTT distributed updates from HTA to the media partners in Taiwan through press releases, phone calls and instant messages including the announcement of HTA's new president & CEO and Hawai'i's Pre-Travel Testing Program.



SPORTS MARKETING

Sports marketing is an important component of HTA's branding strategy. Sports events attract fans and foster the desire to visit Hawai'i through media exposure while giving residents opportunities to see world-class athletes compete in Hawai'i.



However, because of the COVID-19 pandemic, in 2020 HTA only sponsored a handful of sporting events between January and March, prior to when the state's travel quarantine order went into effect:

- PGA Tour "Aloha Swing" (January 2020)
 - Sentry Tournament of Champions at Kapalua
 - Sony Open at Wai'alae
 - Mitsubishi Electric Championship at Hualālai
- Polynesian Football Hall of Fame – Polynesian Bowl at Aloha Stadium (January 2020)
- Hula Bowl at Aloha Stadium (January 2020)
- Davis Cup – United States vs. Uzbekistan at Blaisdell Arena (March 2020)



Miami Dolphins quarterback and former Alabama Crimson Tide quarterback Tua Tagovailoa visited James Campbell High School for a special motivational assembly as part of community outreach leading up to the Polynesian Bowl. (Photo credit: Hawai'i Department of Education)

BUDGET AND FINANCES

HTA is funded through money collected from the Transient Accommodations Tax (TAT), a 10.25% tax that people pay when they stay in legal accommodations in Hawaii. Effective May of 2020, HTA's allocation of TAT revenue was suspended as a result of the COVID-19 pandemic.

Hawai'i Tourism Authority

Fiscal Year 2020 Actuals

REVENUES	
TAT Deposits - Tourism Special Fund	\$65,833
Investment Income / Miscellaneous Receipts	\$2,898
TOTAL REVENUES	\$68,731
APPROPRIATIONS	
FY 2020	\$87,438
TOTAL APPROPRIATIONS	\$87,438
HTA EXPENDITURES*	
Perpetuating Hawaiian Culture	\$3,276
Natural Resources	\$1,620
Community	\$3,440
Branding	\$40,653
Sports	\$3,089
Safety and Security	\$3,489
Tourism Research	\$3,112
Administrative	\$1,515
Governance and Organization-Wide	\$1,397
TOTAL HTA EXPENDITURES	\$61,591

* Hawaiian culture is intertwined throughout all areas of HTA activity.

HAWAI'I CONVENTION CENTER

- Construction completed in 1998
- State-owned facility
- Managed by ASM Global



Fiscal Year 2020 Actuals

REVENUES		
TAT Deposits - Convention Center Enterprise Special Fund		\$13,750
Convention Center Operations		\$6,670
Investment Income / Miscellaneous Receipts		\$979
TOTAL REVENUES		\$21,399
APPROPRIATIONS		
FY 2020		\$54,045
TOTAL APPROPRIATIONS		\$54,045
EXPENDITURES		
Convention Center Facility Operations:		
Operator Costs		\$9,848
HTA Administration		\$236
Governance & Org-Wide Costs (Incl. Convention Center Insurance)		\$331
Convention Center Sales and Marketing		\$5,486
Convention Center Repair and Maintenance		\$4,753
TOTAL EXPENDITURES		\$20,654

Hawai'i Convention Center

In response to the COVID-19 pandemic, the Hawai'i Convention Center continues to follow State of Hawai'i restrictions to help prevent the spread of COVID-19, remaining closed since March 18, 2020. While all public events previously scheduled during this time are either postponed or cancelled, the Center has continued to serve our communities. This includes:

- Serving as a temporary satellite location for the Hawaii Department of Labor and Industrial Relations to process unemployment insurance claims from April to July 2020. While this location was not open to the public, volunteer personnel and staff used socially distanced workstations to process a record number of unemployment claims.
- From July through November 2020, the State of Hawai'i's Office of Elections is using a portion of the Center's exhibit hall space as a temporary vote counting center.
- The Department of Health is also utilizing a portion the Center's ballroom as its contact tracing office.
- The Center also served as a temporary shelter during Hurricane Douglas last July, converting one of its exhibit halls to house anyone seeking shelter from the hurricane.



More photos available here:

https://www.dropbox.com/sh/7hdcmaheyeowfjy/AAB_Ey6kaw04SBgl1QcERnZza?dl=0

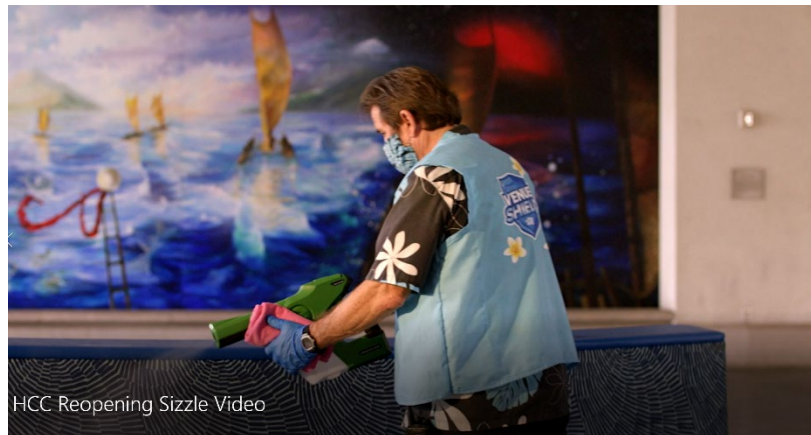
Reopening Protocols

The Center has also implemented a comprehensive [health and safety program](#) developed by leading venue and event management company ASM Global to ensure the highest levels of health and safety for staff, guests and communities. In compliance with guidelines established by the Centers for Disease Control (CDC) and the State of Hawai'i Department of Health, these extensive measures include:

- Enhanced cleaning and sanitation and the use of electrostatic sprayers;
- The installation of thermal cameras and touchless temperature checks;
- The use of personal protective equipment (PPE);
- Modified food and beverage operations, including fresh, individually packaged meals and snacks;
- Increased availability of hand-sanitizer dispensers;
- Contactless transactions, special signage and social-distancing guidelines.

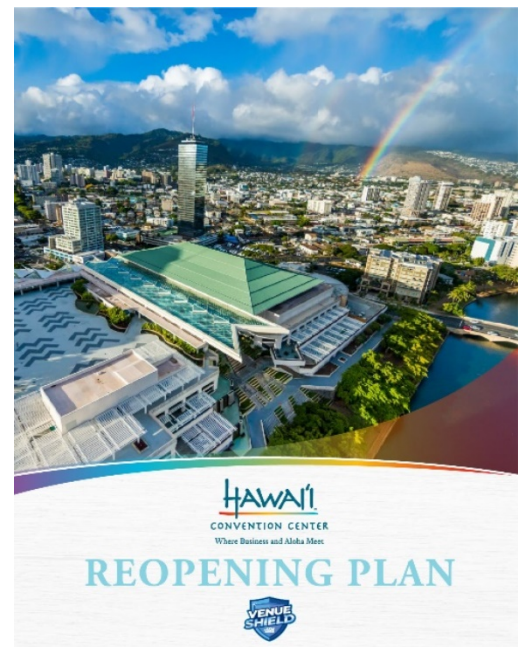


To further showcase these new protocols, the Center has produced a **Reopening Sizzle Video** where members of the HCC team highlight our new health and safety measures to ensure that our clients and attendees will have a safe and successful meeting. Video can be viewed [HERE](#)



The Center has also developed a **Reopening Plan** with guidelines to best facilitate meetings and events when the building reopens. This includes new operation protocols for each department, including food and beverage, and sales and event services.

The Center has also developed **new virtual meetings packages** to offer guests the convenience of attending meetings remotely. This full array of turnkey video-production services includes professionally coordinated pre-recording management, webinar and live-stream production, and hybrid meeting design and execution across a variety of popular virtual platforms.



More photos of reopening protocols available here:

<https://www.dropbox.com/sh/une2noz9ue08ih/AACrtXXSe1OaGblilG1KE9Ga?dl=0>

Capital Improvement Projects

The Hawai'i Convention Center also completed several major improvement and maintenance projects to enhance the overall operations of the building and prepare for reopening. Projects include:

- **Cooling Tower Replacement:** Cooling tower replacement will be completed in late 2020, with the installation of two of the four towers already finished. The towers are part of the building's air conditioning system.
- **Facility Equipment:** The Center has purchased new banquet chairs and décor items to better service events. Tables have also been added to accommodate new social distancing measures.
- **Security Measures:** New security cameras and archiving systems have been installed, and other security upgrades are planned. Thermal cameras are also being used to monitor staff and guests entering the building as part of the Center's COVID-19 health and safety protocols.
- **Energy-Efficient Lighting:** As part of its commitment to environmental sustainability and its recent Leadership in Energy and Environmental Design (LEED) Certification, the Center is upgrading its lighting to LED bulbs in select locations.
- **Trellis Replacement:** Several of the Center's wooden trellises will be replaced with a more durable shade system that can be closed to shield against rain or angled to block sun and wind. Lighting will be installed under trellises near gathering and events areas.

Additional maintenance projects are being completed throughout the building, including tiling, Ala Wai waterfall repairs, roof repairs, boiler replacement and chiller repair.



More photos of CIP projects available here:

<https://www.dropbox.com/sh/r5gdvyihym41eci/AACOKD7jHyWoubdragAL6PPNa?dl=0>

TOURISM RESEARCH AND PLANNING

HTA's Tourism Research Division assisted the Hawai'i Emergency Management Agency, the Hawai'i Department of Health, the Hawai'i Department of Transportation, the Attorney General's office, and the Office of Enterprise Technology Services (ETS) and others during the COVID-19 pandemic. Members of HTA's research team and its contractors helped with the daily manual scanning and verification of the Mandatory Travel Declaration forms and the Order for Self-Quarantine forms. In addition, HTA's research team helped with the coordination of a call center that checked up on quarantined visitors, provided police and Attorney General investigators with information they needed to verify quarantine violations. Even after the Safe Travels digital program started in September, replacing the paper forms, HTA's research team continued to publish daily trans-Pacific passenger arrival numbers on HTA's website, as requested by ETS.

Despite the extra workload during the pandemic, HTA's Tourism Research Division has continued to provide the information and data that so many in Hawai'i depend on. The availability and utilization of timely, insightful visitor research is vital to Hawai'i's tourism industry stakeholders for making sound business decisions. Hawai'i tourism is in a very mature phase requiring continuous research and gathering of data to supplement knowledge for enhancing brand awareness, improving product experiences, maintaining competitive advantages against other destinations, and balancing the needs of Hawai'i's residents and communities. HTA's Tourism Research Division ensures quality marketing research is available to educate tourism stakeholders and help empower them in making intelligent, data-driven decisions.

PROGRAMS

- Calculation of Visitor Characteristics and Expenditures
- Evaluation and Performance Measures
- Estimation of Visitor Arrivals by Country by Month
- Marketing Research and Other Research
- Data Dissemination
- Tourism Strategic Plan and Brand Management Plan
- Infrastructure Research

Publication	Section of Website	Release Date(s)
Monthly Visitor Statistics and News Release	Monthly Visitor Statistics	By the last day of the following month
Major Market Area Highlights and Fact Sheets	Monthly Visitor Statistics	By the last day of the following month
Air Seat Outlook (3 months)	Infrastructure Research	By the last day of the month prior
Hawai'i Hotel Performance Report	Infrastructure Research	By the last day of the following month
Hawai'i Timeshare Quarterly Report	Infrastructure Research	Quarterly
Hawai'i Vacation Rental Performance Report	Infrastructure Research	By the last day of the following month
Annual Visitor Research Report	Annual Visitor Research	Annually, in the fall
Visitor Plant Inventory	Visitor Plant Inventory	Annually, in December
Quarterly Visitor Satisfaction Monitoring Report	Visitor Satisfaction and Activity	Quarterly
Annual Visitor Satisfaction and Activities Report	Visitor Satisfaction and Activity	Annually, in the fall
Quarterly Timeshare Report	Infrastructure Research	Quarterly
Marketing Effectiveness Study	Other Research	Annually, in spring and fall
Resident Sentiment Survey	Evaluation and Performance Measures	Annually
Daily Air Passenger Counts	DBEDT	By 4 p.m. each workday
Tourism Forecast	DBEDT	Quarterly
Tourism Dashboard	DBEDT	Monthly
Tourism Data Warehouse	DBEDT	Monthly
Transpacific Passenger Arrivals	COVID-19 Updates	Special for the pandemic. Daily
Destination Brand Index Trends	Other Research	Special for the pandemic. Weekly
Travel Agency Bookings Report	Other Research	Special for the pandemic. Weekly

HAWAI'I VISITOR STATISTICS

Statewide and by Island

Table 1: Statewide Visitor Statistics

Statewide	2019	2020 Forecast	% Change	2020P YTD (Sept) ¹	% Change YTD (Sept)
Visitor Expenditures (\$mil.) ²	17,844.30	5,122.00	-71.3%	N/A	N/A
Visitor Arrivals (Air and Cruise)	10,386,673	2,730,000	-73.7%	2,220,009	-71.6%
Per-Person Per-Day Spending	196.1	168.4	-14.1%	N/A	N/A
Total Air Seats	13,619,349	5,654,977	-58.5%	4,055,028	-60.4%

Table 2: O'ahu Visitor Statistics

O'ahu	2019	2020P YTD (Sept) ¹	% Change YTD (Sept)
Visitor Expenditures (\$mil.)	8,139.8	N/A	N/A
Visitor Arrivals	6,154,248	1,289,494	-72.3%
Per-Person Per-Day Spending	194.6	N/A	N/A
Total Air Seats	8,415,431	2,648,496	-58.0%

Table 3: Kaua'i Visitor Statistics

Kaua'i	2019	2020P YTD (Sept) ¹	% Change YTD (Sept)
Visitor Expenditures (\$mil.)	1,909.0	N/A	N/A
Visitor Arrivals	1,370,029	287,462	-72.3%
Per-Person Per-Day Spending	188.8	N/A	N/A
Total Air Seats	998,635	245,509	-67.4%

Table 4: Island of Hawai'i Visitor Statistics

Island of Hawai'i	2019	2020P YTD (Sept) ¹	% Change YTD (Sept)
Visitor Expenditures (\$mil.)	2,315.9	N/A	N/A
Visitor Arrivals	1,763,904	405,481	-69.4%
Per-Person Per-Day Spending	178.4	N/A	N/A
Total Air Seats	1,309,603	376,492	-62.5%

Table 5: Maui Visitor Statistics

Maui	2019	2020P YTD (Sept) ¹	% Change YTD (Sept)
Visitor Expenditures (\$mil.)	5,128.0	N/A	N/A
Visitor Arrivals	3,059,905	614,211	-73.5%
Per-Person Per-Day Spending	211.7	N/A	N/A
Total Air Seats	2,895,680	784,531	-63.7%

Table 6: Moloka'i Visitor Statistics

Moloka'i	2019	2020P YTD (Sept) ¹	% Change YTD (Sept)
Visitor Expenditures (\$mil.)	36.0	N/A	N/A
Visitor Arrivals	63,035	14,899	69.0%
Per-Person Per-Day Spending	126.0	N/A	N/A

¹ 2020 data are preliminary.

² 2019 visitor spending includes, air, cruise and supplemental business. 2020 year-to-date expenditures do not include supplemental business.

Table 7: Lāna'i Visitor Statistics

Lāna'i	2019	2020P YTD (Sept) ¹	% Change YTD (Sept)
Visitor Expenditures (\$mil.)	128.9	N/A	N/A
Visitor Arrivals	84,103	15,215	-76.7%
Per-Person Per-Day Spending	478.8	N/A	N/A

Global Source Markets

Table 8: U.S. West Market Visitor Statistics

U.S West	2019	2020 Forecast	% Change	2020P YTD (Sept) ¹	% Change YTD (Sept)
Visitor Expenditures (\$mil.)	6,952.0	1,985.27	-71.4%	N/A	N/A
Visitor Arrivals	4,595,319	1,209,596	-73.7%	963,552	-72.1%
Per-Person Per-Day Spending	174.9	146.7	-16.1%	N/A	N/A
Total Air Seats	8,564,295	3,948,965	-53.9%	2,700,408	-57.9%

Table 9: U.S. East Market Visitor Statistics

U.S East	2019	2020 Forecast	% Change	2020P YTD (Sept) ¹	% Change YTD (Sept)
Visitor Expenditures (\$mil.)	4,684.2	1,518.81	-67.6%	N/A	N/A
Visitor Arrivals	2,276,520	671,695	-70.5%	554,736	-69.1%
Per-Person Per-Day Spending	212.6	178.6	-16.0%	N/A	N/A
Total Air Seats	1,182,495	514,121	-56.5%	372,468	-59.1%

Table 10: Japan Market Visitor Statistics

Japan	2019	2020 Forecast	% Change	2020P YTD (Sept) ¹	% Change YTD (Sept)
Visitor Expenditures (\$mil.)	2,248.3	546.10	-75.7%	N/A	N/A
Visitor Arrivals	1,576,205	349,500	-77.8%	294,647	-74.9%
Per-Person Per-Day Spending	241.6	241.5	-0.1%	N/A	N/A
Total Air Seats	1,999,204	594,985	-70.2%	467,002	-68.8%

Table 11: Canada Market Visitor Statistics

Canada	2019	2020 Forecast	% Change	2020P YTD (Sept) ¹	% Change YTD (Sept)
Visitor Expenditures (\$mil.)	1,081.5	474.89	-56.1%	N/A	N/A
Visitor Arrivals	540,103	185,672	-65.6%	156,177	-60.3%
Per-Person Per-Day Spending	165.0	175.3	6.2%	N/A	N/A
Total Air Seats	484,613	219,487	-54.7%	164,881	-53.8%

Table 12: Oceania Market Visitor Statistics

Oceania	2019	2020 Forecast	% Change	2020P YTD (Sept) ¹	% Change YTD (Sept)
Visitor Expenditures (\$mil.)	895.1	188.59	-78.9%	N/A	N/A
Visitor Arrivals	363,551	72,511	-80.1%	60,934	-78.1%
Per-Person Per-Day Spending	261.7	253.8	-3.0%	N/A	N/A
Total Air Seats	494,582	95,737	-80.6%	95,737	-74.6%

Table 13: Korea Market Visitor Statistics

Korea	2019	2020 Forecast	% Change	2020P YTD (Sept) ¹	% Change YTD (Sept)
Visitor Expenditures (\$mil.)	497.90	118.01	-76.3%	N/A	N/A
Visitor Arrivals	229,056	49,771	-78.3%	41,818	-74.8%
Per-Person Per-Day Spending	285.2	252.8	-11.4%	N/A	N/A
Total Air Seats	326,398	88,421	-72.9%	71,175	-70.8%

Table 14: China Market Visitor Statistics

China	2019	2020 Forecast	% Change	2020P YTD (Sept) ¹	% Change YTD (Sept)
Visitor Expenditures (\$mil.)	242.80	N/A	N/A	N/A	N/A
Visitor Arrivals	92,082	N/A	N/A	10,088	-86.7%
Per-Person Per-Day Spending	329	N/A	N/A	N/A	N/A
Total Air Seats	116,539	8,176	-93.0%	8,176	-91.3%

Table 15: Taiwan Market Visitor Statistics

Taiwan	2019	2020 Forecast	% Change	2020P YTD (Sept) ¹	% Change YTD (Sept)
Visitor Expenditures (\$mil.)	54.80	N/A	N/A	N/A	N/A
Visitor Arrivals	24,242	N/A	N/A	3,479	-82.6%
Per-Person Per-Day Spending	251	N/A	N/A	N/A	N/A
Total Air Seats	39,780	7,344	-81.5%	7,344	-76.0%

Table 16: Europe Market Visitor Statistics

Europe	2019	2020 Forecast	% Change	2020P YTD (Sept) ¹	% Change YTD (Sept)
Visitor Expenditures (\$mil.)	268.10	50.40	-81.2%	N/A	N/A
Visitor Arrivals	137,908	24,811	-82.0%	20,716	-80.0%
Per-Person Per-Day Spending	150.6	137.6	-8.7%	N/A	N/A

Table 17: Southeast Asia Market Visitor Statistics

Southeast Asia	2019	2020 Forecast	% Change	2020P YTD (Sept) ¹	% Change YTD (Sept)
Visitor Expenditures (\$mil.)	73.1	N/A	N/A	N/A	N/A
Visitor Arrivals	40,752	N/A	N/A	7,683	-84.5%
Per-Person Per-Day Spending	219.4	N/A	N/A	N/A	N/A

SAFETY AND SECURITY

The COVID-19 pandemic that negatively impacted the globe, nation and the State of Hawai'i has had far-reaching and devastating impacts on our community. The Hawai'i Tourism Authority's role in the COVID-19 response was driven primarily through requests by the State of Hawai'i Emergency Management Agency (HI-EMA), the Incident Commander (IC) Major General Kenneth Hara, and Governor David Ige. The HTA's Safety and Security program was involved in numerous missions, some of which have continued through the end of Fiscal Year 2020 and into Fiscal Year 2021. This unprecedented crisis required an unprecedented response by the State of Hawai'i because the magnitude required the involvement of virtually every department, agency, and level of government. The HTA's ability to properly and successfully complete the various missions assigned through Incident Commander Hara is a testament to the dedication, commitment, and sacrifice of the team.

COVID-19 Efforts

Beginning in late February and early March of 2020, the HTA was asked to become involved in numerous COVID-19 missions through the direction of Incident Commander Kenneth Hara and HI-EMA. The primary goal of these missions was to assist in the prevention of COVID-19 spread throughout Hawai'i. These missions included:

- VASH Flight Assistance Program
- Airport Screening
- Passenger Form Scanning
- Call Center
- Digital Data Collection

Beyond those efforts, HTA continued to support:

- The Visitor Aloha Society in all counties
- Maui Nui Marine Resource Council
- Hawaiian Lifeguard Association

Due to the COVID-19 crisis, most 2020 contracts were rescinded or not issued as funds for the programs was no longer available. Governor Ige issued his Sixth Supplementary Emergency Proclamation on April 16, 2020 which suspended Hawai'i Revised Statutes (HRS) 237D-6.5 and halted all disbursements of Transient Accommodations Tax (TAT) including to the HTA. The following programs were suspended due to the suspension of HRS 237D-6.5:

- Lifeguard Safety Programs in all counties
- Statewide Junior Lifeguard Program
- Ocean safety advertising campaign at Hawaii's airports



HTA activated its Department Operations Center at the Hawai'i Convention Center

VASH Flight Assistance Program

In April 2020, the HTA provided \$25,000 in additional funding to the Visitor Aloha Society of Hawai'i (VASH) to support the creation of the COVID-19 Flight Assistance Program. The program's purpose is to serve as a resource to law enforcement that may be faced with a need to return uncooperative travelers, subject to quarantine, back to their airport of origin. VASH has assisted with airfare, hotel accommodations and taxi rides, when necessary. VASH plans to continue the program until the end of calendar year 2020 as it has proven to help the State with managing quarantine breakers.

HTA also funded the Visitor Aloha Society of Hawaii Island with \$2,700 for a project to make fabric face masks for industry partners in order to stop the spread of COVID-19. VASHI followed the CDC guidelines in the making of the masks.



HPD Officers who were among the industry partners to receive face masks by VASHI

Airport Screening

Pursuant to the emergency proclamation and subsequent supplemental proclamations issued by Governor Ige, HTA was asked to provide screening support and funding at Honolulu, Kahului and Kona airports. From March 2020 to July 2020, HTA provided support to the Department of Transportation (DOT) Airports Division by contracting with Roberts Hawaii, OmniTrak, Anthology Group, and Worldwide Flight Services to provide professional staff to carry out screening processes at the arrival gates.

Passenger Form Scanning

From March 2020 to September 2020, HTA was responsible for scanning travel-related quarantine documents at the Daniel K. Inouye International Airport in Honolulu. This was done in partnership with SMS and DOT-Airports. Forms were collected statewide from arriving transpacific flights, scanned, and then uploaded into a database. The data was then utilized to support HTA's call center operations and served as a critical link to law enforcement partners tasked with enforcing the 14-day self-quarantine order. Neighbor island forms were collected daily and sent to Honolulu for processing.

Call Center

From March 2020 to September 2020, the HTA supported the operation of a call center that was established to contact arriving transpacific passengers (visitors and residents) as part of the State's efforts related to the self-quarantine order. HTA worked with HVCB, who lead in managing the day-to-day activities of the call center. Individuals were trained to make calls seven days a week, from 9 a.m. to 8 p.m. HTA utilized a cloud-based PBX system (Grasshopper) to allow call agents to connect and make calls using their own phones routed through the PBX system.

In May 2020, HTA determined that the existing call center operation was not sustainable and began searching for a technological solution that would improve the efficiency of the program. The use of automated technology to make calls was identified as the most effective solution. Vendor 8x8 was selected based on cost, technology and the proven ability to deliver a product that would meet the needs of the mission. After September 2020 the call center efforts were replaced by the new Safe Travels program, developed and operated by ETS (the Office of Enterprise Technology Services). The new Safe Travels program sends text and email messages to transpacific passengers required to adhere to the State's mandatory quarantine.

Digital Data Collection Tool (Interisland)

HTA was asked by Governor Ige to assist with moving from a paper-based form process to a digital data collection tool as part of the lifting of the 14-day interisland travel quarantine. In May 2020, the HTA began an effort to develop the necessary infrastructure and tools to efficiently collect information using ESRI's technology, from interisland passengers as part of the overall mission. On July 1, 2020, the digital data collection tool was operationalized, and between July 1 and July 31, the system processed more than 50,000 submissions for interisland travelers. HTA was also involved in expanding the digital data collection tool to be used to support the transpacific flight arrival process. Given the technical skills needed to scale the project, it was determined that the Office of Enterprise Technology Services (ETS), with direction from the Department of Health, would be the most appropriate agency to take ownership. In late June 2020, the handoff was made and eventually, ETS decided to move the platform to Google. HTA remained as a resource to the ETS team.

HTA Continued to Support

Maui Nui Coral Reef Signage Project

In 2020, HTA continued to work with Maui Marine Resource Council who were funded \$47,144 in 2019 for a project to replace and create new signs related to the coral reef on Maui. The Maui Visitors and Convention Bureau (MVCB) and the contractor worked with the County on acquiring the necessary permits to obtain right of entry to the County park sites. In July 2020 the contractor reported that the coral reef signs were successfully installed.



Coral Reef Sign installed by Maui Marine Resource Council at one of the locations in Maui

Hawaiian Lifeguard Association - Snorkel Safety Study

During 2020, HTA continued to support the Hawaiian Lifeguard Association with their Snorkel Safety contract that was executed in 2019 for \$131,000. Their snorkel safety study is set to be completed in June 2021. The purpose of this two-year study is to formally assess the causes and risk factors in snorkel-related fatalities and near fatal drownings. HLA has been working on collecting and analyzing data, conduct scientific research, conduct surveys and interviews, and consult with experts in the appropriate fields. The State of Hawai'i Department of Health and the City and County of Honolulu lifeguards are collaborating on the study as well.

HTA Programs affected by the COVID-19 pandemic

Lifeguard Safety Program in all counties

Due to the COVID-19 crisis, the Lifeguard Safety Programs contracts across the counties for 2020-2021 were rescinded as funds for these programs was no longer available. HTA plans to revisit these programs in the future once returned to normal funding levels again. Previous years of supporting these programs, have been successful for continuous lifeguard safety and updated ocean equipment to help keep visitors and residents safe.

Ocean Safety Advertising Campaign at Hawaii's airports

The contracts for Ocean Safety Video placements across the Hawaii airports have been helpful with educating visitors and returning residents on ocean safety in Hawaii. Both contracts expired in June 2020, and the agreements were originally planned to be extended to continue showing these videos at the airports however due to the COVID-19 pandemic, an extension was no longer possible as funds for extending these programs was no longer available. Similar to the Lifeguard Support Programs, HTA plans on revisiting these programs and hope to be able to fund them again in the future.

COMMUNICATIONS

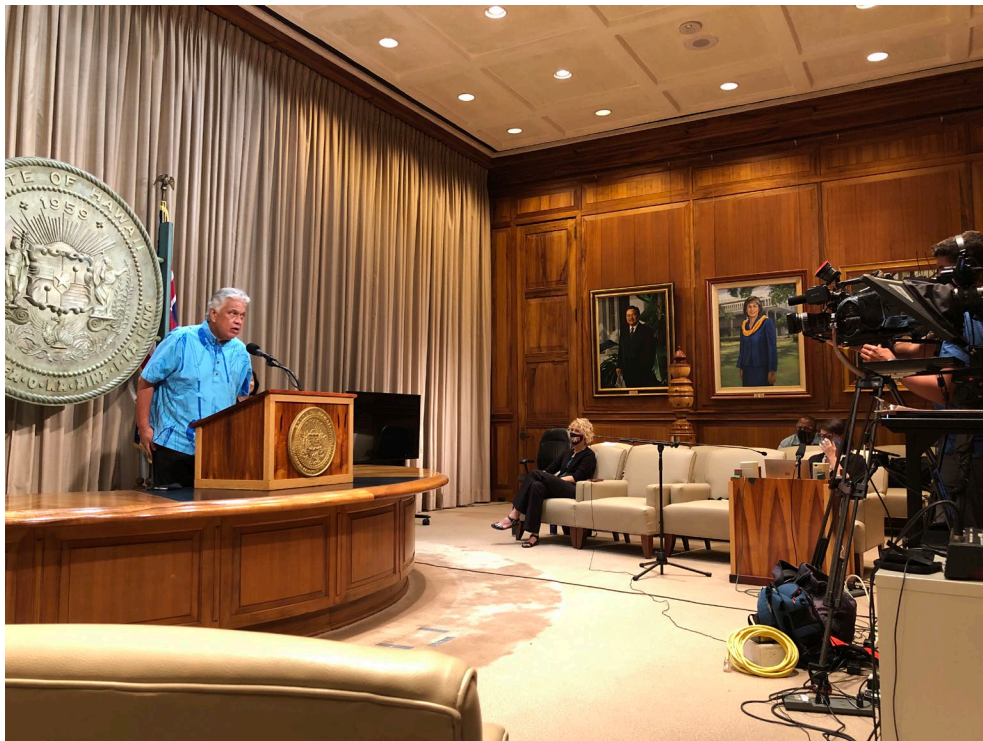
During much of 2020, HTA's communications efforts were focused on crisis communications because of the COVID-19 pandemic. The situation was incredibly fluid so HTA's communications team made it a priority to provide timely newsworthy updates to its staff, board members, the HTA global marketing team, county officials, state lawmakers, industry partners and others.

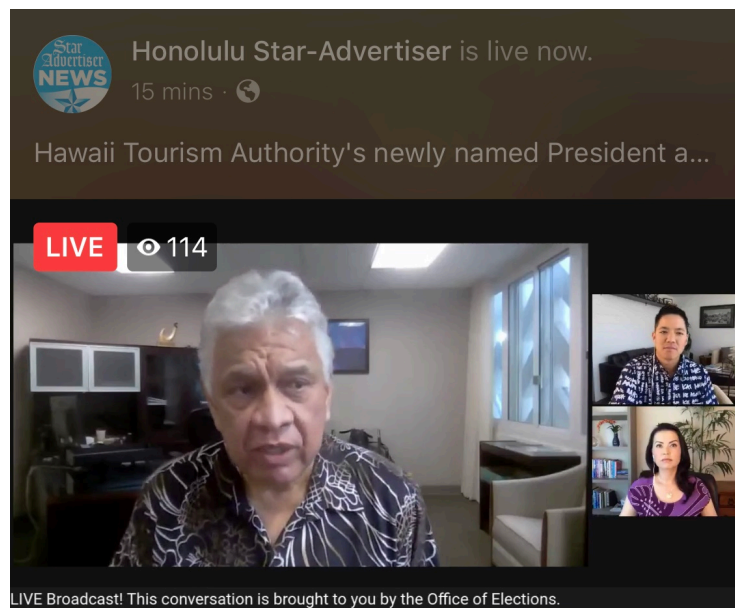
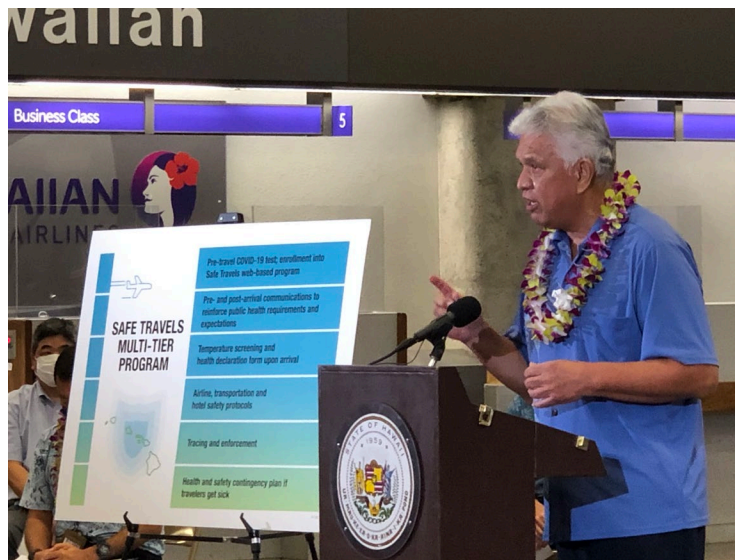
Internal and industry communications

- Sent nearly 1,400 COVID-related email updates between January and November including:
 - New COVID-19 case numbers in Hawai'i from the Department of Health
 - Media advisories
 - Press releases
 - Transcripts and notes of the governor's press conferences
 - HTA's daily briefer
 - Joint Information Center's Daily News Digest
 - Important industry updates

Media relations

- Responded to hundreds of inquiries from reporters and members of the media in Hawai'i, on the mainland and around the world
- Sent nearly 200 press releases during 2020 to HTA's distribution list
- Facilitated interview requests
- Assisted HTA's president and CEO with press conferences





Crisis response

- Responded to thousands of emails, phone calls and social media messages from travelers and future travelers mainly regarding the quarantine protocols and pre-travel testing program
- Responded to inquiries from visitor industry partners
- Participated in the state's Joint Information Center
- Assisted the public information officers in other state and county departments
- Participated in HTA's Department Operations Center
- Daily updates to HTA's website: www.hawaii tourism authority.org/covid-19-updates/
- Daily updates shared on HTA's Facebook page: www.facebook.com/HawaiiHTA
- Shared daily trans-Pacific passenger arrival numbers via daily press releases from March 26-September 2, and on HTA's website thereafter once the digital Safe Travels program started



For Immediate Release: August 25, 2020
HTA Release (20-168)

Hawai'i Passenger Arrivals By Air

HONOLULU – Yesterday, 2,118 people arrived in Hawai'i. During this same time last year approximately 35,000 passengers arrived in Hawai'i daily, including residents and visitors. The state's mandatory 14-day self-quarantine started on March 26th for all passengers arriving in Hawai'i from out of state. This table shows the number of people who arrived by air from out of state yesterday and does not include interisland travel. This data was collected from the Hawai'i Department of Transportation's (DOT) Mandatory Travel Declaration Form.

	Kona	Maui	O'ahu	Lihue	Grand Total
Crew	9	21	134	6	170
Transit			107		107
Military			118		118
Exempt			209		209
Relocate to Hawaii	7	17	143		167
Returning Resident	46	74	617	94	831
Visitor	36	52	418	10	516
Grand Total	98	164	1746	110	2118
Flights	2	3	23	1	29

Crew = flight crew members

Transit = people who are in transit to another location through Hawai'i and aren't leaving the airport

Military = military exempt personnel

Exempt = people who are exempt from the 14-day quarantine after receiving prior approval from the state

Relocate to Hawai'i = people who are moving to Hawai'i

Returning Resident = people who indicate on the DOT's form that they're returning residents

Visitor = people who are not in the above categories

The following table shows what the O'ahu visitors indicated as the purpose of their trip, and they can choose more than one.

Purpose of Visit	O'ahu
Business	102
Business, Relocate to Hawaii	2
Relocate to Hawaii	17
Vacation	31
Vacation, Visiting Friends & Family	7
Visiting Friends & Family	198
Visiting Friends & Family, Business	4
Visiting Friends & Family, Relocate to Hawaii	4
(blank)	53
Grand Total	418

For Hawai'i Tourism Authority and state updates regarding COVID-19 visit:
<https://www.hawaii tourism authority.org/news/alerts/covid-19-novel-coronavirus/>

###

About the Hawai'i Tourism Authority

The **Hawai'i Tourism Authority** is the State of Hawai'i agency responsible for strategically managing its support of the tourism industry. Established in 1998 to support Hawai'i's leading industry and largest employer, HTA continually strives to help ensure tourism's sustainability and the benefits it brings to residents and communities statewide. Follow updates about HTA on [Facebook](#), [Instagram](#), and [Twitter](#) (@HawaiiHTA).

For more information, contact:

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HTA COVID-19 UPDATE

(Issued: 12/4/20 @ 4:00pm)

Reason for Trip by Arrival Airport - Transpacific Screened Passengers as of 12/03/20	Honolulu (HNL)	Kahului (OGG)	Kona (KOA)	Lihue (LIH)	Grand Total
Airline Crew	410	149	67	37	663
Connecting Flight (Transit)	368	12	4	1	385
Corporate Meeting	3	4	2	0	9
Essential Worker	106	18	19	4	147
Honeymoon	10	5	0	0	15
Incentive Trip	5	2	0	0	7
Intended Resident	119	27	28	4	178
Military or Federal Government	103	2	0	5	110
Other	75	8	28	0	111
Other Business	63	32	22	1	118
Pleasure/Vacation	1,744	1,813	640	6	4,203
Returning Resident	1,034	190	164	20	1,408
Sports Event	110	1	0	0	111
To Attend School	18	0	0	0	18
To Get Married	7	0	4	0	16
Transit	4	0	0	0	4
Visiting Friends or Relatives	990	250	156	9	1,405
Grand Total	5,169	2,518	1,134	87	8,908

Source: Safe Travels program developed by the State of Hawaii Office of Enterprise Technology Services
 Note: The data is preliminary and subject to change

Novel Coronavirus in Hawaii

COVID-19 Positive Cases
 Cumulative totals as of 12:00pm on December 4, 2020

Total Confirmed Cases	18,290* (106 new)
Hawaii	1,623
Kauai	119
Lanai	106
Maui	579†
Molokai	18
Oahu	15,613
Out of State	232
Pending	0
Required Hospitalization	1,325‡
Hawaii Deaths	256
Cases in the past 14 days	1,300**

Footnotes for COVID-19 Cases

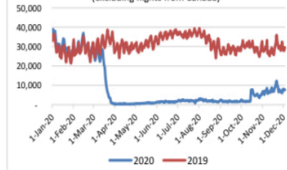
*As a result of updated information, one HI resident diagnosed out of state and one case from Oahu were dropped from the counts.

**Using cases reported in the past 14 days provides a rough approximation of the number of cases currently meeting criteria for isolation. This may vary number for "active cases" as isolation classification issues for cases unable to be reached or who are out of jurisdiction, for whom precise release from isolation date may not be possible to determine. It is also not influenced by lags in data entry. (This total does not include Hawaii residents diagnosed outside of Hawaii)

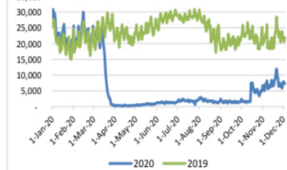
†One case is a Lanai resident whose exposure is on Maui Island and who will be remaining on Maui Island for the interim.

‡Includes Hawaii residents hospitalized out of state. Includes cases that meet isolation release criteria (isolation should be maintained until at least 24 hours after resolution of fever and myalgia without the use of antipyretics OR at least 30 days have passed since symptom onset, whichever is longer). (The cases that have died and one case that has left the jurisdiction have been removed from these counts). Positive cases include confirmed cases, and Hawaii residents and non-residents; data are preliminary and subject to change. Note that CDC provides case counts according to states of residence.

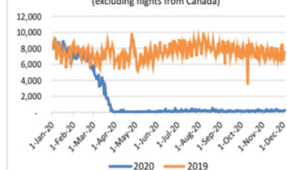
Total Passenger Count (excluding flights from Canada)



Domestic Passenger Count



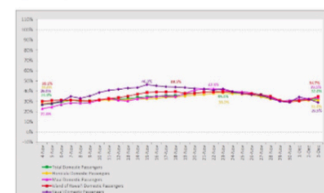
International Passenger Count (excluding flights from Canada)



Daily Passenger Count Table

12/03/2020	Domestic	International	Total
Oahu	4110	262	4372
Maui	2239	2239	2239
Island of Hawaii	1010	1010	1010
Kauai	47	47	47
State	7406	262	7418

7-Day Domestic by Island Moving Average Daily Passenger Volume
 2020 Volume as Percentage of 2019 Volume
 Through December 3, 2020



Source: HNTB Analysis based on data from DOT
 Note: Passenger volume figures include both state and non-state residents.

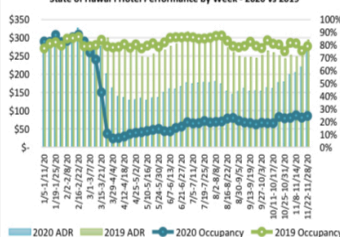
Domestic by Island Month-to-Date and Year-to-Date Daily Passenger Volume
 2020 Volume versus 2019 Volume
 Through December 3, 2020

December 2020 (Month-to-Date through December 3)				
	2020	2019	Volume Change	Percent Change
Honolulu	12,527	38,367	-26,040	-67.9%
Maui County	6,433	35,743	-29,310	-45.7%
Island of Hawaii†	2,762	4,894	-2,132	-43.6%
Kauai	1,579	5,882	-4,303	-73.2%
Total	22,618	67,490	-44,872	-66.5%

2020 Year-to-Date through December 3				
	2020	2019	Volume Change	Percent Change
Honolulu	1,389,245	4,235,715	-2,846,470	-67.2%
Maui County	540,170	2,882,341	-2,342,171	-81.3%
Island of Hawaii†	247,022	897,023	-650,001	-72.5%
Kauai	188,411	705,507	-517,096	-73.4%
Total	2,362,847	7,915,585	-5,552,738	-70.3%

Source: HNTB analysis based on data from DOT
 Note: Passenger volume figures include both state and non-state residents. Total includes other international passengers. †Includes one additional day due to long term February 2019, 2020.

State of Hawaii's Hotel Performance by Week - 2020 vs 2019



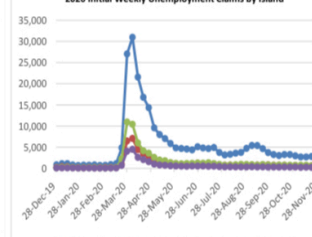
Source: STR, Inc. © Copyright 2020 Hawaii's Tourism Authority

Hawaii Hotel Performance Info:

For the week of November 22 – November 28, 2020

	Occupancy	ADR	RevPAR
State of Hawaii	24.4%	\$ 275.04	\$ 67.10
Oahu	22.7%	\$ 177.47	\$ 40.28
Maui County	24.4%	\$ 475.52	\$ 116.07
Kauai County	33.0%	\$ 237.83	\$ 78.49
Island of Hawaii	25.7%	\$ 256.90	\$ 65.96

2020 Initial Weekly Unemployment Claims by Island



Weekly Unemployment Initial Claims: November 28, 2020

State of Hawaii	3,566
C&C of Oahu	2,323
Hawaii County	459
Maui County	436
Kauai County	233
Agent (filed in Hawaii against another state)	115

News Highlights

December 4, 2020

KITV4: 50 Honolulu Police officers have tested positive for COVID-19 since start of pandemic

KHON2: COVID spike in Oahu, prison adds another obstacle to loosening restrictions

Honolulu Civil Beat: Modifying Safe Travels Program Could Alleviate Health, Economic Fears

Hawaii Tribune-Herald: States plan for vaccines as daily US virus deaths top 3,100

Travel Pulse: Delta to Become First Airline With International COVID-19 Contact Tracing Program

Travel Pulse: Aloha Canada 2020 Virtual Hawaii Tourism Show: A Definite Success

Travel Pulse: US Travel Predicts Turnaround in Second Quarter of 2021

Travel Awaits: From Lockdown Comes Life: Beloved Hawaiian Tourist Spot Sees Wildlife Return

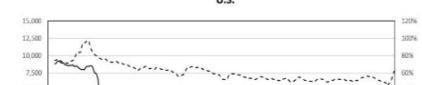
Timeout: Hawaii will pay for your round-trip ticket if you decide to temporarily relocate to Honolulu

Hawaii Resources
 Department of Health
<https://hawaiihealth.com/>

Department of Health
<https://health.hawaii.gov/doh/advisories/novel-coronavirus-2019/>

Dept. of Business, Economic Development & Tourism
<https://dbedt.hawaii.gov/economic/covid19/>

Department of Transportation
<https://dot.hawaii.gov/coronavirus/>

Travel Agency Bookings to Hawaii for Future Arrivals*
 Based on a 7-day Moving Average, 2020 vs 2019
 U.S.Travel Agency Bookings to Hawaii for Future Arrivals*
 Based on a 7-day Moving Average, 2020 vs 2019
 Japan

HTA TEAM

John De Fries

President and Chief Executive Officer

Keith Regan

Chief Administrative Officer

Pattie Herman

Vice President of Marketing and Product Development

Marc Togashi

Vice President of Finance

Caroline Anderson

Director of Community Enrichment

Jennifer Chun

Director of Tourism Research

Jadie Goo

Director of Marketing

Kalani Ka'anā'anā

Director of Hawaiian Cultural Affairs and Natural Resources

Marisa Yamane

Director of Communications and Public Relations

Kristen Andres

Administrative Assistant

Minami Aoki

Tourism Market Manager

Maile Carvalho

Finance Administrative Assistant

Tracey Fermahin

Administrative Assistant

Maka Casson-Fisher

Program Specialist

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Isabella Dance

Contracts and Administrative Manager

Anda Garel

Administrative Assistant

Laci Goshi

Tourism Market Manager

Carole Hagihara

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Administrative Assistant

Lawrence Liu

Tourism Research Statistician

Cynthia Morita

Finance Assistant

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